ePORT User's Guide

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ePORT Overview

Introduction

Welcome to ePORT – the electronic Project Online Reporting Tool. ePORT's objective is to provide a common framework for capturing the health status of MSFC programs and projects that meet the guidelines of NPG 7120.5 to Provide Aerospace Products and Capabilities (PAPAC). Primary objectives of ePORT are to ensure adequate management planning is in place for compliance with NPG 7120.5 and measuring performance to the approved planning for cost, schedule and technical performance parameters. Secondary objectives focus on ensuring all MSFC programs and projects have a minimum suite of tools to manage their initiative, independent of their size and budget. This ePORT User's Guide contains information on system requirements and basic features of the tool.

Tips on Using this User's Guide

Figures created from screen shots of ePORT are used extensively throughout this User's Guide to enhance the text descriptions of the tool's functions. Specific areas of interest are indicated in the figure by a letter enclosed in a circle. The corresponding text will direct the user to these areas of interest by referring to the figure number and letter (e.g., Figure 1-1-A).

Special notes that highlight ways for the user to improve their experience with ePORT are shown throughout the User's Guide in brackets and starting with "**TIP:**"

Buttons or links in ePORT discussed in this User's Guide will be distinguished throughout by highlighting the item in bold inside brackets (e.g., **[Click Here]**).

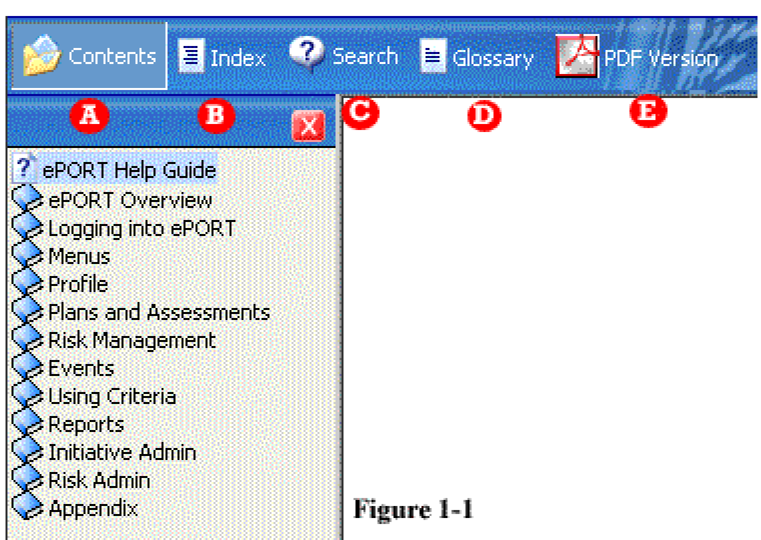


Figure 1-1

Navigating the Help Guide

Figure 1-1 shows the ePORT user's guide navigation menu. The Contents section, (Figure 1-1-A) displays a drill down list of topics available in the user's guide. Clicking on a topic will get a list of sub topics. Clicking on a sub topic will display the page on the right detailing that topic.

The Index, (Figure 1-1-B) provides a list of key words that can be clicked on to find their location in the help guide.

Search, (Figure 1-1-C) provides a search box that key words may be typed into. A list of topics will then be generated based on that key word. This feature is only available to Window's PC users.

The Glossary, (Figure 1-1-D) is a list of terms and their definitions.

(Figure 1-1-E) is a link to the Adobe PDF version of this help guide. Clicking on this option will open the user's guide as a pdf document in your current browser window. The pdf file can be viewed online or downloaded for off-line viewing.

Key terms and section names will be hyperlinked throughout the guide to provide immediate access to or detailed descriptions of that item.

Accessing ePORT

Access to ePORT is limited to the Program/Project Manager or personnel designated as their representatives for either data entry or review. Each program or project is partitioned from the others to only allow access to approved members of your team or upper management.

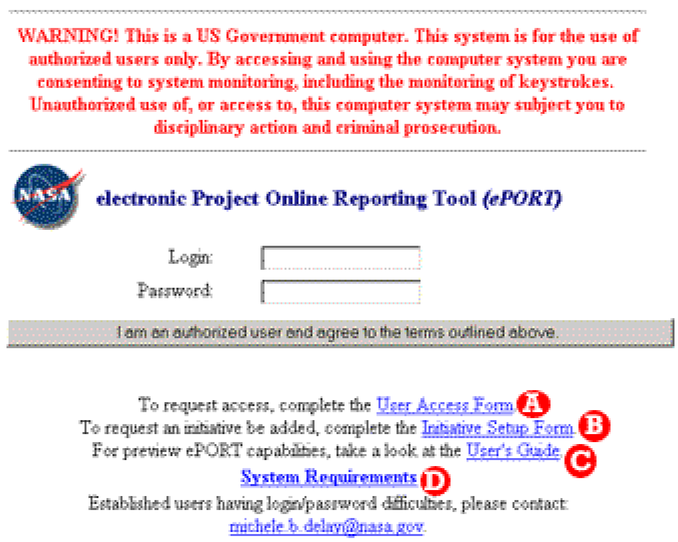


Figure 2-1

Program/Project Managers and Risk Mangers can request access based on their project responsibilities by submitting an online User Access Form (Figure 1-2-A) located on the log-in screen. Program/Project team members must submit the online User Access form and then request access to a specific initiative by contacting the Program or Risk Manager of that initiative.

New initiatives can be setup by the Program or Risk Manager by printing, completing and faxing an Initiative set up form found on the log-in screen, (Figure 1-2-B).

The user's guide can be accessed from outside ePORT by using the user's guide link, (Figure 1-2-C).

Clicking on the system requirements link takes the user to a new page detailing ePORT's system requirements and providing access to the latest version of software needed to view ePORT as well as some optional plug-ins.

Once a user has received their log-in and password they may proceed to the tool via the internet by directing their browser to: https://eport.msfc.nasa.gov/

System Requirements

ePORT was developed so that users would not be required to acquire special proprietary software except for the normal freeware multimedia plug-ins in order to use this tool. The development team has a continuous objective to ensure the tool is platform independent. ePORT is designed to work consistently on PC and Macintosh platforms using Internet Explorer. While ePORT may work with older or newer versions of the software specified, it was designed and tested using the versions listed.

ePORT System Requirements

Platform	**Internet Browser**
Macintosh	Internet Explorer 5.1.6 for Mac OS 8.1 to 9.x
	Internet Explorer 5.2.2 for Mac OS X
Windows 9x, NT, 2000	Internet Explorer
Additional Plug-Ins	Adobe Reader 4.05a or greater
A	Crystal Reports Off-Line Viewer (Windows Only)

(Site best viewed with Times New Roman font.)

Figure 1-5

For more information on using the Crystal Off-line Viewer, (Figure 1-3-A), please refer to the section, Crystal Off-line Viewer.

Logging into ePORT

Log-in Screen

From the ePORT log-in screen (Figure 2-1-A) the user can enter their log-in and password provided by the Administrator, then click the

[I am an authorized user. . .] button. ePORT uses secure socket layer (SSL) encryption to ensure security of the user log-in and password.

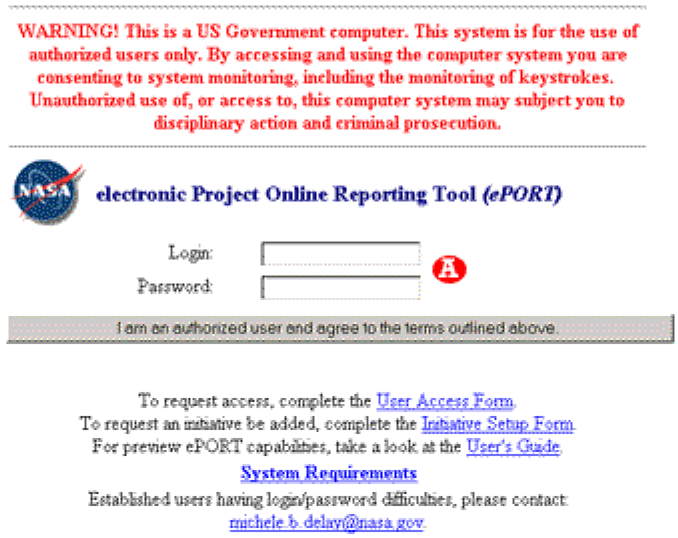


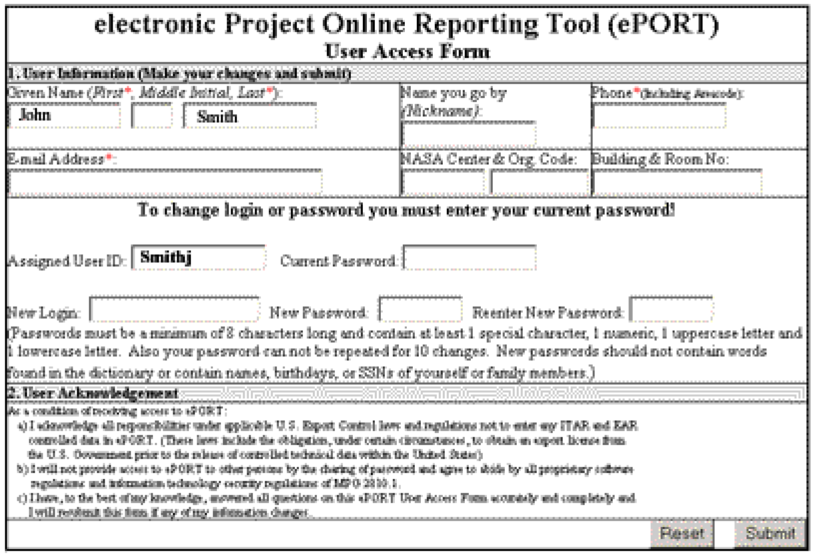
Figure 2-1

[**TIP:** *The Log-in and password are not case sensitive.*]

For information on how to gain access to ePORT please refer to the section [Accessing ePORT](#).

Changing the Password

My Preferences for John Smith


electronic Project Online Reporting Tool (ePORT)
User Access Form

1. User Information (Make your changes and submit)

Given Name (*First**, *Middle Initial*, *Last**): John | Smith

Name you go by (*Nickname*):

Phone* (Including Areacode):

E-mail Address*:

NASA Center & Org. Code:

Building & Room No:

To change login or password you must enter your current password!

Assigned User ID: Smithj   Current Password:

New Login: New Password: Reenter New Password:

(Passwords must be a minimum of 8 characters long and contain at least 1 special character, 1 numeric, 1 uppercase letter and 1 lowercase letter. Also your password can not be repeated for 10 changes. New passwords should not contain words found in the dictionary or contain names, birthdays, or SSNs of yourself or family members.)

2. User Acknowledgement

As a condition of receiving access to ePORT:

a) I acknowledge all responsibilities under applicable U.S. Export Control laws and regulations not to enter any ITAR and EAR controlled data in ePORT. (These laws include the obligation, under certain circumstances, to obtain an export license from the U.S. Government prior to the release of controlled technical data within the United States)

b) I will not provide access to ePORT to other persons by the sharing of password and agree to abide by all proprietary software regulations and information technology security regulations of MPG 2810.1.

c) I have, to the best of my knowledge, answered all questions on this ePORT User Access Form accurately and completely and I will resubmit this form if any of my information changes.

Reset | Submit

Figure 2-2

The My Preferences Module provides the user the ability to personalize their log-in and password information (Figure 2-1-A). Passwords have to be change at regular intervals, which is currently set at 90 days. When the password has expired the user will be prompted to create a new password that is a minimum of 8 characters, containing an upper and lower case letter, a number and a special character. This module also provides the user with any pertinent messages from the ePORT administrator.

The My Preferences page also allows the user to select a search criteria that will be used as the default criteria. For more information on using report criteria please refer to the section Using Report Criteria.

Menus

Using the Main Menu

Initiative Pull Down Menu

To change initiatives simply click on the pull down menu (Figure 3-1-A) and select the desired initiative. If an initiative has an * beside it is part of a cluster and allows view only access. Clusters are custom groupings of initiatives with a view only status. These groups are primarily for top level management to view data. Managers and users of ePORT will want to access initiatives that are not denoted with an * if they plan on making changes to the data.

[**TIP:** *When switching between initiatives, ePORT will display the new initiative data in the last module viewed with the previous initiative*]

Elements of the Main Menu

Figure 3-1

The primary menu is divided into seven major sections: Message Center, Profile, Plans & Assessments, Management Strategies, Reports, Help, and Setup.

The first section, Message Center (Figure 3-1-B), returns the user to the initial main screen to view messages pertaining to ePORT. For more detailed information please refer to the Message Center.

The second section, Profile (Figure 3-1-C), links to a one-screen synopsis of your project containing a description, management points of contact, and reporting hierarchy. For more detail information please refer to the Profile section.

The third section, Plans & Assessments (Figure 3-1-D), contains the primary health status modules: Management, Cost, Schedule, Technical, and Workforce.

The fourth section, Management Strategies (Figure 3-1-E), contains tools for managing the initiative on a continual basis. By selecting [**Risks**], users gain access to a complete risk management database to plan strategies for recognizing and mitigating potential threats to the initiative's success. By selecting [**Events**], the Manager of the initiative can identify and track off nominal conditions along with recovery plans to ensure the initiative satisfies its objectives.

The fifth section, Reports (Figure 3-1-F), allows the user to select specific data and templates to create tailored reports. These reports can be downloaded in numerous presentation formats, including portable document format (.pdf), rich text format (.rtf), document (.doc), and excel (.xls). For more detail information on Reporting, please refer to the Overview of Reports section.

The sixth section, Help (Figure 3-1-G), contains immediate resources to aid the user in using ePORT. By selecting [**User Guide**], a new web browser window will open and provide access to a web based help guide. By selecting [**FAQ**], the user can view the most frequently asked questions along with their answer or submit their own question. By selecting [**Comments/Questions**], the user can view comments and responses entered to date and submit comments, questions or bugs to the administrator.

The seventh section, Setup (Figure 3-1-H), houses all user-defined preferences that are available to task manager, risk manager or the general user. Everyone has access to their own user preferences by selecting [**My Preferences**] but the [**Admin**] and [**Risk Admin**] options will only appear if the user has been granted the corresponding privileges. The [**Admin**] section allows the task manager to establish the global settings for their initiative. The [**Risk Admin**] section allows the risk manager to establish the risk settings for their initiative.

[**TIP:** *It is a good practice to always [**Sign Out**], (Figure 3-1-I), of ePORT after each session to maintain integrity of your initiatives data*]

Message Center

After successfully entering ePORT the user is taken to the main navigation page (Figure 4-1) and can navigate through the entire website via menus. For detailed descriptions of the many ePORT functions introduced here, skip to the section of this User's Guide that describes that specific module.

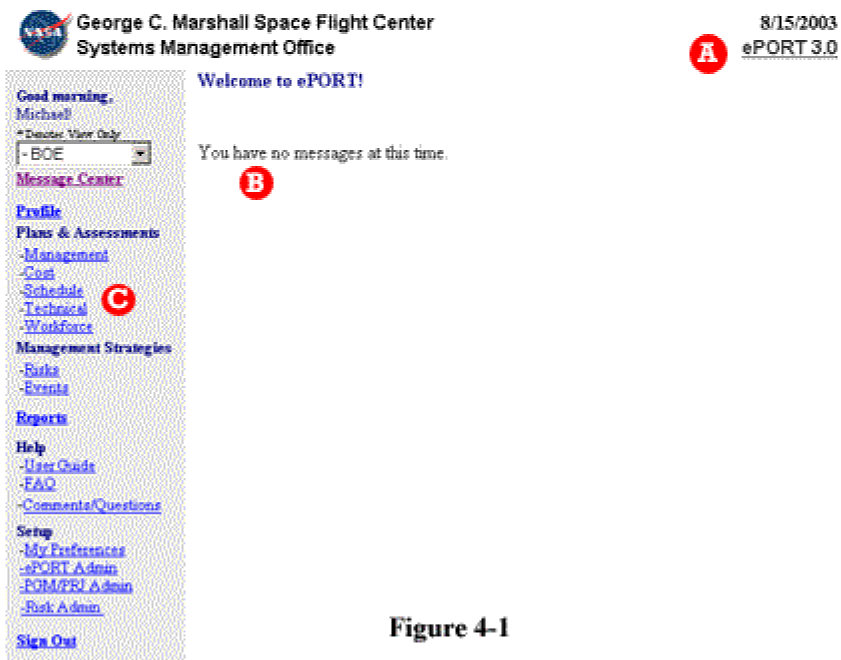


Figure 4-1

The ePORT banner (Figure 4-1-A) at the top of the browser window shows the current date and version of ePORT. Clicking on the current version will open a window highlighting major modifications.

On the right side (Figure 4-1-B) of the browser window is the module window where the user is initially greeted with messages from the ePORT Administrator. These messages will include both general information and specific project information.

Older Administrative messages are archived in the "Message Archives". These can be accessed by clicking on the Message Archive link, (Figure 4-1-B).

On the left side (Figure 4-1-C) of the browser window is the primary menu that is constantly available in this location throughout ePORT. The top of the primary menu acknowledges the user and displays a pull down menu that contains a list of the initiatives available to the specific user logged in at that time.

[**TIP:** *The initiatives are grouped by program, followed by its associated projects.*]

Module Navigation

While each module has unique capabilities and features, there are some features and general navigation aids that are common across all modules. (Figure 5-1) shows the common header located at the top of the module window and to the right of the primary menu.

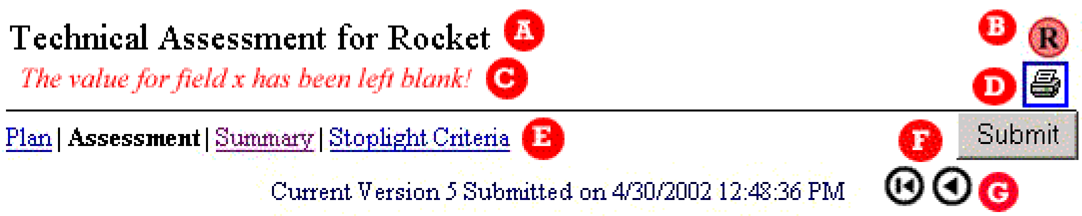


Figure 5-1

At the top of the module window the user will see the module name and initiative's acronym (Figure 5-1-A), any summary flags for the module (Figure 5-1-B), and any module specific messages (Figure 5-1-C). To quickly create a printer friendly view of the current screen the user can select the printer icon (Figure 5-1-D). Below the separator line the user will see the module menu options (Figure 5-1-E) and the submit button (Figure 5-1-F) for recording data changes to the current module displayed.

[**TIP:** *The active selection from the module menus will be highlighted in bold.*]

Below the module menu line is the scrollable archive (Figure 5-1-G) that allows the user to review previously saved data for the current module view. Changes to data can only be made to the current version. If archived revisions of the data are available, the scroll buttons will be displayed at the end of the revision information. If archived revisions are not available the buttons will not appear. To look through the revisions, the user can simply click the directional buttons defined below to scroll through the changes.

Takes the user to the oldest version of the data for the specified module view.

Takes the user to the last version of data immediately before the one actively viewed.

Takes the user to the next version of data immediately following the one actively viewed.

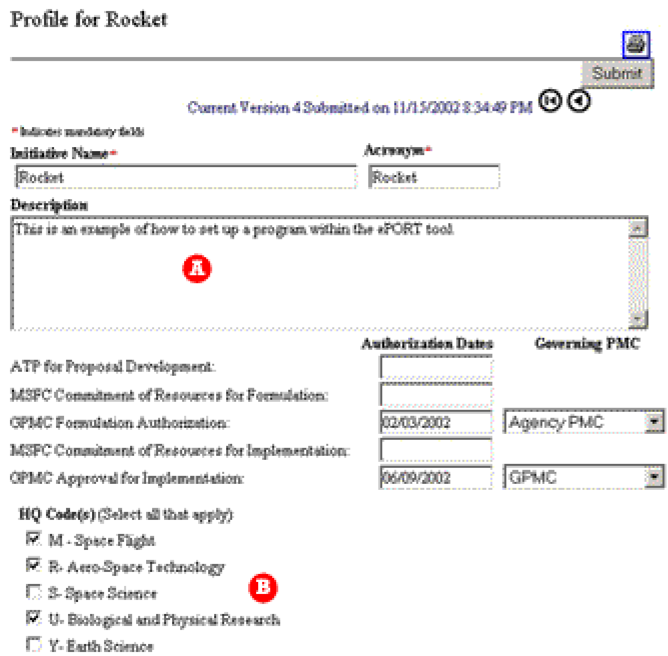
Takes the user to the most recent version of data for the specified module view.

The date, time, and number of each revision will appear in blue. Below the revision line, the user will see any module unique instructions

[**TIP:** *Fields that have a red asterisk (*) beside them are mandatory fields that must be filled in.*]

Profile

Creating Your Profile



The purpose of the Profile section (Figure 6-1) is to provide an overview of the initiative and identify the major points of contact.

Initiatives that are also listed on the MSFC Program, Project & activity list maintained by the Program Management Council are not updatable through ePORT.

[**TIP:** *When setting up a new initiative, the Administrator will enter the initiative name and acronym*]

A concise paragraph describing the initiative can be entered in the Description field (Figure 6-1-A). The Authorization Dates and Governing PMC fields are used to capture the name of the approving body and dates the initiative started Formulation and Implementation phases.

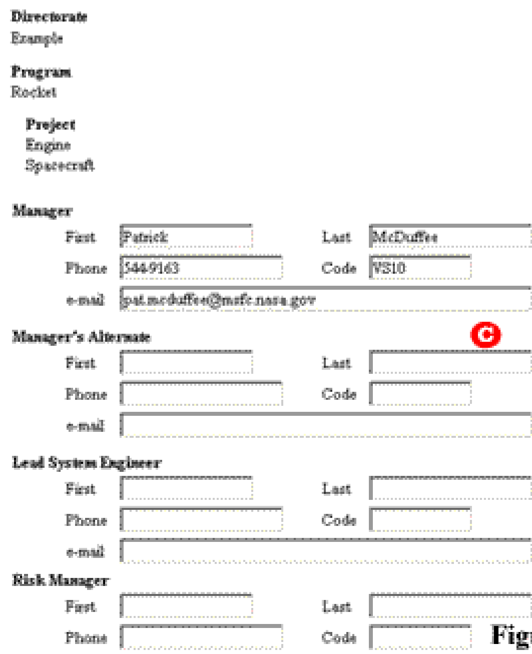


Figure 6-1

Simply check the boxes beside the applicable HQ codes. The remaining information concerning the directorate, program, project and activities that the initiative may be related to are automatically completed by the data in the PMC's Program/Project list.

The final section (Figure 6-1-C) of the Profile contains fields to capture information for the major points of contact for the initiative.

After completing the necessary fields, click the **[Submit**] button to send the information to the database.

[**TIP:** *The updated current revision information at the top of the page confirms the changes were successfully received by the database*].

Plans and Assessments

Assessment Overview

Each of Plans and Assessments modules (i.e., Management, Cost, Schedule, Technical, Workforce) contains module menus to view or modify the initiative's approved plan or Manager's current assessment. Simply select the [**Plan**] or [**Assessment**] button in the module menu to enter the respective areas. The Manager's assessments can be entered daily, monthly or whenever is convenient for the initiative's management.

[**TIP:** *The system by default will take the user to the assessment menu when selecting a specific module from the primary menu, since it is typically the most frequently used.*]

The guidelines identified in the Appendix – Stoplight Criteria and Definitions, should be used to determine the appropriate assessment color ("**G**" for green, "**Y**" for yellow, or "**R**" for red). The definitions are available within each of the Plans and Assessments modules by selecting [**Stoplight Criteria**] from the module menu.

The Assessment Summary area (Figure 7-1) is used to concisely describe why the initiative's approved plan is not being met and describes how the Manager intends to get back on track. The Deviations field (Figure 7-1-A) should summarize why the overall assessment is yellow or red. The Recovery Plans field (Figure 7-1-B) should summarize how the manager intends to address the deviation to return to their approved plan (i.e., green).

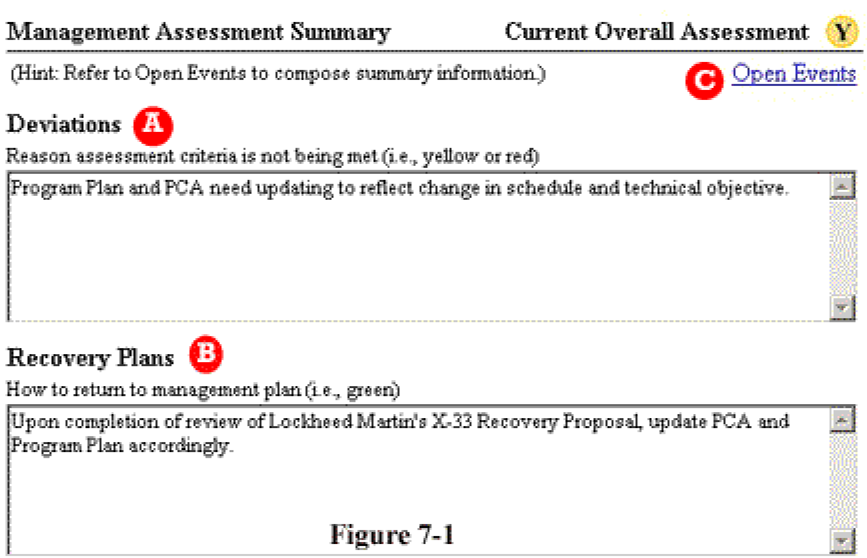


Figure 7-1

If the Manager is utilizing the Events module found in the Management Strategies section, the user can access open events for reference and to assist in development of the Assessment Summary. By selecting the [**Open Events**] button (Figure 7-1-C) to the right of the summary fields, the system will open another window that displays all the open events that affect the current Plans and Assessment module being viewed. From this separate window the user can review or copy and paste event descriptions or plans into the summary fields. Once the fields are completed click the [**Submit**] button to send the information to the database.

Management Assessment

The Management module (Figure 8-1) is the first module in the Plans and Assessments section and is where the user can identify and assess the management products required and controlled by the initiative.

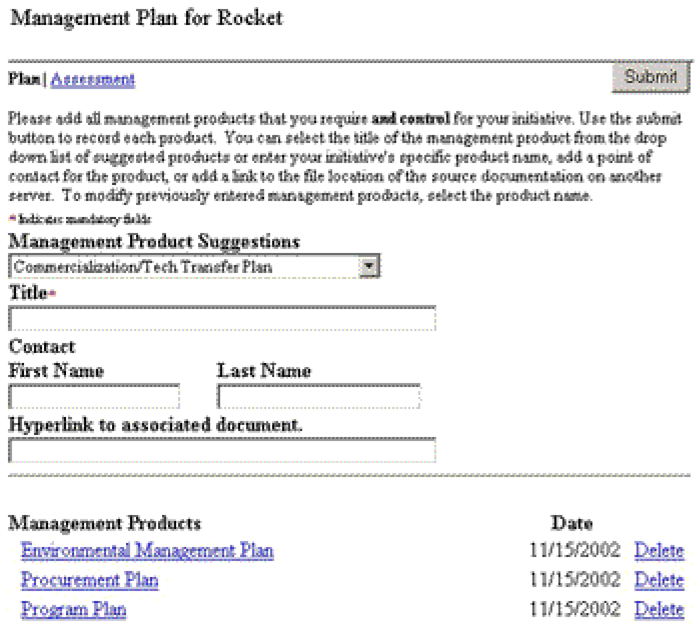


Figure 8-1

When [**Management**] is selected from the primary menu, the Management Assessment page appears on the right, in the module window. Initially the user must select [**Plan**] to input the management products desired. The management plan page provides a default listing of management products that are available for selection by the Manager. By selecting the desired product from the pull down menu, the product name will appear in the Title block. If the management product you are looking for is not in the list or the initiative uses a different name for one of the products, simply click in the title block and enter or modify the desired title. Complete the additional optional information and select the [**Submit**] button to record your data in the database.

[**TIP:** *The manager should only identify management products that are required and controlled by the initiative*]

Changes can be made to the information provided by clicking on the title of the management product and modifying the data. A management product can be deleted by simply clicking on [**Delete**] button adjacent to the line item.

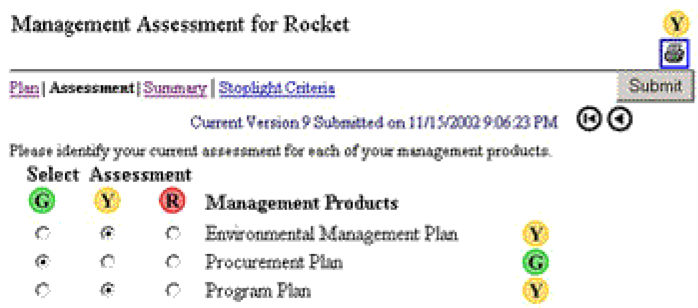


Figure 8-2

After the Management Plan is completed the user can proceed to the Management Assessment page by clicking on the [**Assessment**] button. The user will notice only the management products that were created on the Management Plan page will appear on the Management Assessment page (Figure 8-2). To update the assessment, simply select the radio button with the appropriate stoplight color for each of the initiative's management products and then click on the [**Submit]** button. The overall assessment is automatically calculated based on the worst case of all values selected and displayed in the upper right hand corner above the print view icon.

After completing the assessment for each management product, the user can either scroll down the page or click on the [**Summary**] button to complete the Assessment Summary section.

Cost Assessment

The Cost module (Figure 9-1) is where the user can identify the approved cost plan and assess it against the initiative's actual performance.

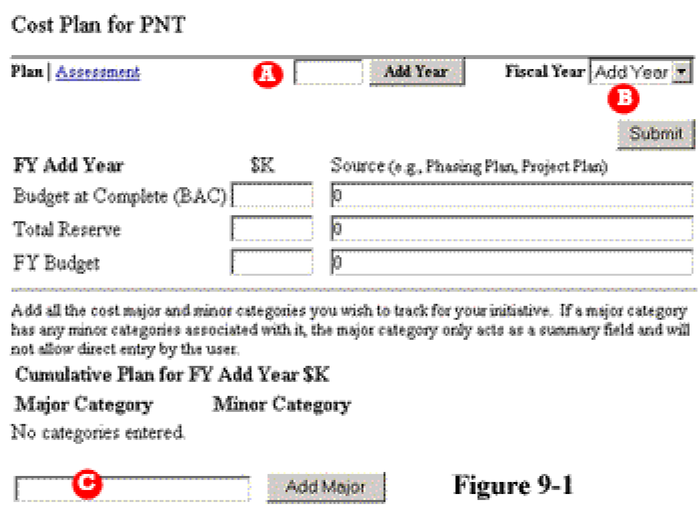


Figure 9-1

When [**Cost**] is selected from the primary menu the Cost Assessment page appears to the right in the module window. Initially the user must select [**Plan**] to input the cost plan.

From the Cost Plan page the Manager is able to add a fiscal year (Figure 9-1-A) by entering the four digit year and clicking on the

[**Add Year**] button. This will add a fiscal year for cost and work force modules simultaneously.

After a year desired has been added, the user should select the fiscal year from the drop down menu (Figure 9-1-B) to begin entering the plan. The Manager should start by entering the initiative's Budget at Complete (BAC), total reserve, and FY budget that reflect the initiative's current approved budget. Next to each of these fields, the Manager should identify the source of the approved budget shown (e.g., Program, Project Plan, phasing plan).

The Cost module allows the Manager to define all the major and minor levels needed to adequately track the initiative's costs. The Manager can add a major level by entering a name in the field (Figure 9-1-C) and clicking on the [**Add Major**] button. The same process is used to create minor levels. The Manager enters a name in the Minor Level field (Figure 9-1-D) and click the [**Add Minor**] button. When a minor level is added to a major level the major level converts to a 'rollup' summing the minor levels below. All major and minor fields can be deleted using the [**Delete]** button adjacent to the line item. The Manager can create as many major and minor levels as needed.

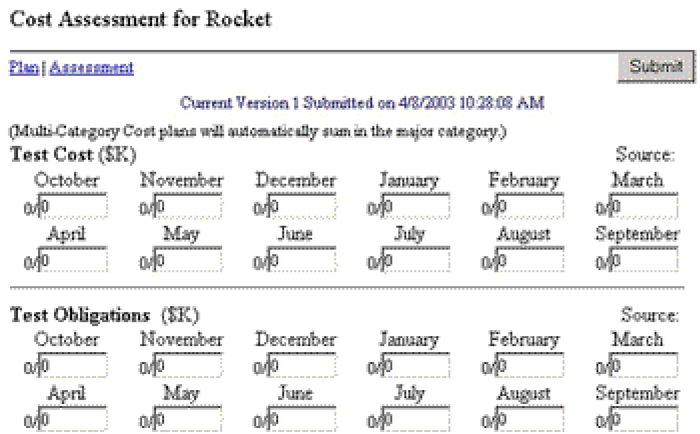
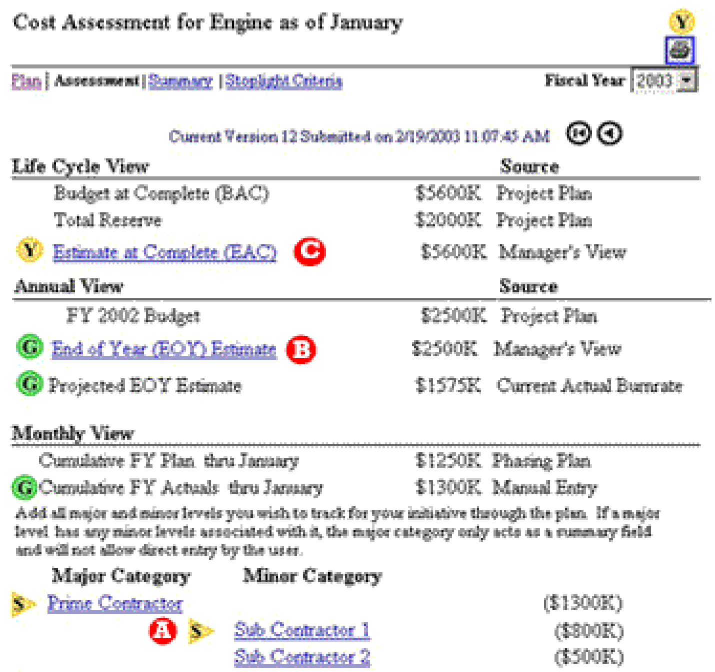


Figure 9-2

Once a level has been added, clicking on the hyperlinked name will open a cost planning table (Figure 9-2) so that values can be added. Similar to the main Cost plan page, the Manager should enter the source of the approved monthly budget (e.g., phasing plans). Once the fields are completed click the [**Submit**] button to send the information to the database. Selecting the hyperlinked Major level that has Minor levels associated with it will open the monthly cost plan table for viewing only. The user cannot directly enter values because the Major level only reflects the sum of the associated Minor Levels. After the Cost Plan is completed the user can proceed to the Cost Assessment page by clicking on the [**Assessment**] button. The user will notice only the Major and Minor levels that were created on the Cost Plan are reflected on the Assessment page (Figure 9-

3). To update the assessment, the user simply selects the Major or Minor category (Figure 9-3-A) desired and enters the actual data. In addition to the actual monthly cost plan, the Manager should identify the Manager's End of Year (EOY) estimate (Figure 9-3-B) and Estimate at Complete (EAC) (Figure 9-3-C) to identify the Manager's expected cost within the current fiscal year and over the life of the initiative. Once the fields are completed click the [**Submit**] button to send the information to the database. The system uses the latest month that has actual data to calculate the Projected EOY Estimate and evaluates data according to the guidelines identified in the Appendix – Stoplight Criteria, to automatically select the appropriate color for the overall cost assessment.



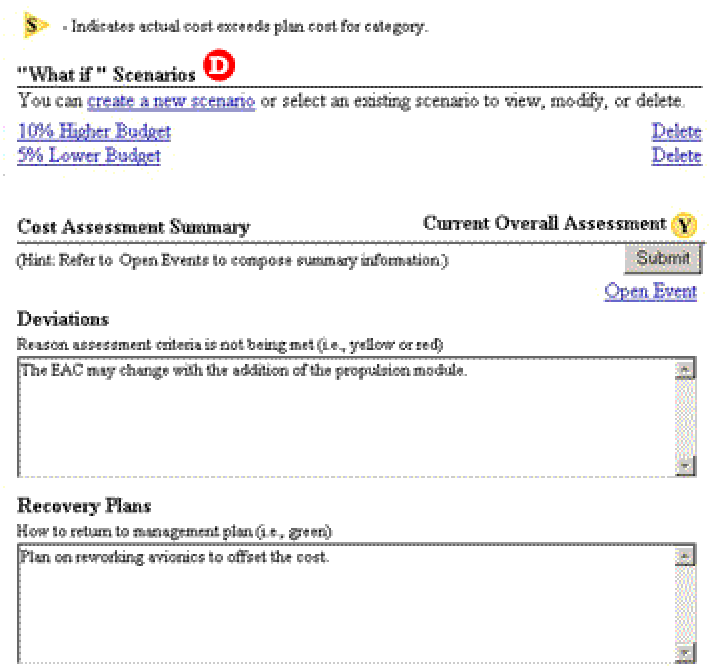


Figure 9-3

The Manager can also use ePORT to consider "what if" scenarios to compare with the approved baseline plan and actual assessments. To use this feature, the Manager simply clicks on the [**create a new scenario**] hypertext link (Figure 9-4-D) and enters a label for the scenario.

[**TIP:** *Each new scenario will copy over the existing planned and actual data to date as a starting point for the Manager to edit*]

After completing the assessment for each management product, the user can either scroll down the page or click on the [**Summary**] button to complete the Assessment Summary section.

Once the fields are completed click the [**Submit**] button to send the information to the database.

Schedule Assessment

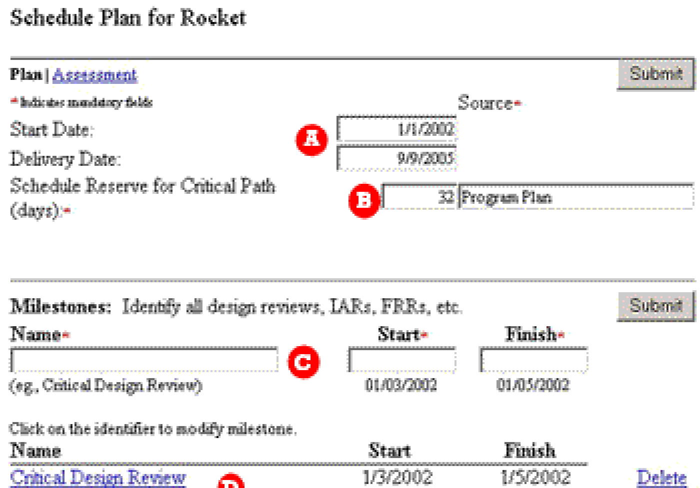


Figure 10-1

The Schedule module is where the Manager can identify both schedule reserve and major milestones that will be compared with the initiative's actual execution.

When [**Schedule**] is selected from the primary menu, the Schedule Assessment page appears to the right in the module window. Initially the user must select [**Plan**] from the module menus to input the schedule plan. The schedule plan page (Figure 10-1) includes two sections; the first being the Schedule Reserve and the second being Major Milestones.

The Start and Delivery Dates (Figure 10-1-A) for the initiative are needed in the reserve burn rate calculations and should be entered in the fields provided. The Manager should identify the number of days reserve the initiative has for the critical path schedule and enter them in the appropriate field (Figure 10-1-B) within the Schedule Plan. This reserve should track back to an approved management product (e.g., Program/Project Plan). Enter this source document in the designated field for reference. Once the fields are completed click the [**Submit**] button to send the information to the database. The Milestone section provides the Manager a place to identify the major milestones that are typically called out in the approved Program or Project Plan.

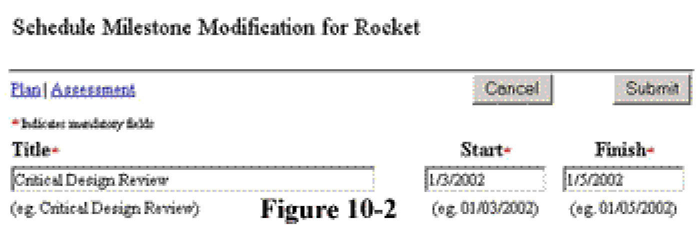


Figure 10-2

Simply fill in an Identifier, Start and Finish dates (Figure 10-1-C) and click on the [**Submit**] button to record the milestone in the plan. Duplicate this process until all milestones are entered. A milestone can be deleted by clicking on the [**Delete**] button adjacent to the milestone itself. The milestone list will instantly be updated to reflect the change. After a milestone has been added, clicking on the hyperlinked identifier (Figure 10-1-D) will open an edit screen (Figure 10-2), allowing the Manager to modify milestone entries in the list.

After completing the Schedule Plan the Manager may proceed to the Schedule Assessment page by clicking on the [**Assessment**] button.

Similar to the Schedule Plan page, the user will notice that the Schedule Assessment page (Figure 10-3) has a field to identify the current actual reserve for the critical path.

The Manager should use the initiative's detail critical path schedule and initiative delivery date to identify the number of days reserve remaining and enter it in the space provided (Figure 10-3-A), then click on the [**Submit**] button to record the data to the database.

The overall stoplight assessment next to the entry field will automatically reflect the comparison between the plan and actual reserve days and the projected reserve based on the current actual burn rate as defined in the guidelines identified in the Appendix - [Stoplight Criteria](). The Manager can then enter or modify the actual start and finish dates for the identified milestones (Figure 10-3-B). Be sure to click on the [**Submit**] button to record the data to the database. The milestone list will instantly be updated to reflect the change and the overall assessment.

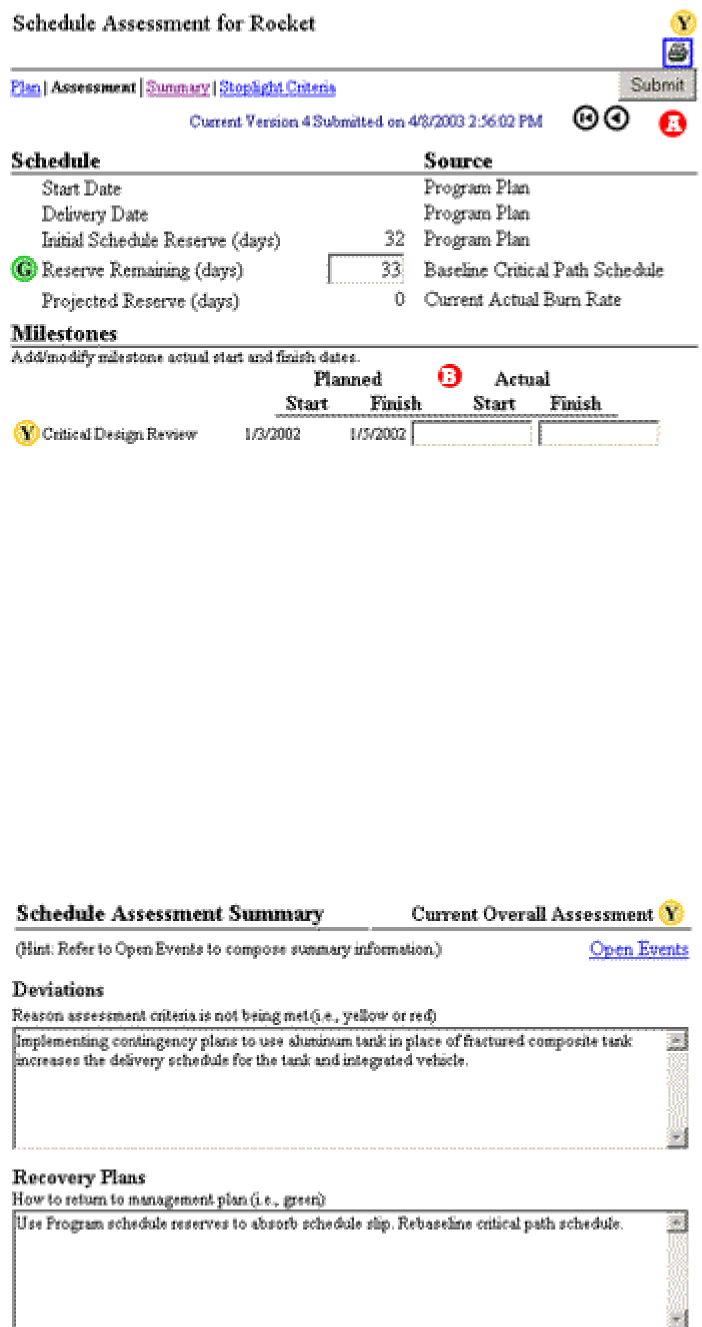


Figure 10-3

[**TIP:** *A delayed actual start of finish date will only indicate a negative trend (i.e., yellow). The assessment will only become red when all* *schedule reserves are depleted, indicated by a negative number for the reserves remaining.*]

After completing the assessment for each management product, the user can either scroll down the page or click on the [**Summary**] button to complete the Assessment Summary section.

Technical Assessment

The Technical module is where the user can identify the mission success criteria typically identified in the approved management plan.

When [**Technical**] is selected from the primary menu the Technical Assessment page appears to the right in the module window. Initially the user must select [**Plan**] to input the Technical plan.

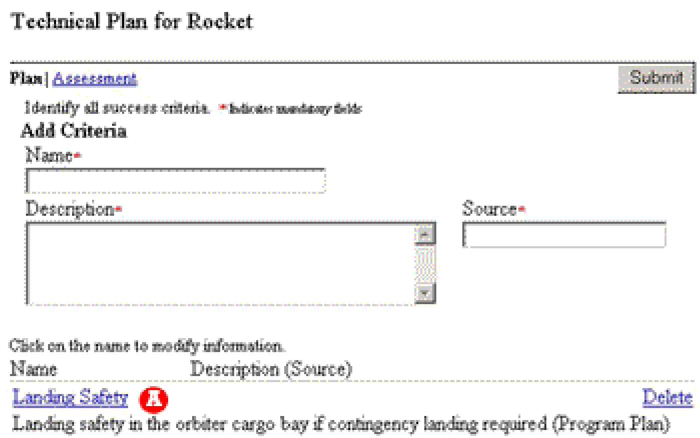


Figure 11-1

The Technical Plan (Figure 11-1) provides fields for the user to enter a unique Identifier, Description of the objective, and Source of objective (e.g., Program/Project Plan). After entering a technical objective, the user should click on the [**Submit**] button to record the data to the database.

The technical objective will immediately be listed below the entry fields as confirmation of a successful entry. Duplicate this process until all technical objectives are entered. Once an objective has been added, clicking on the hyperlinked identifier (Figure 11-1-A) will open an edit screen to modify entries. An objective can be deleted by clicking on the [**Delete**] button adjacent to the objective itself.

After completing the Technical Plan the Manager may proceed to the Technical Assessment page by clicking on the [**Assessment**] button. The user will notice only the Technical objectives that were created on the Technical Plan are reflected on the Assessment page (Figure 11-2).

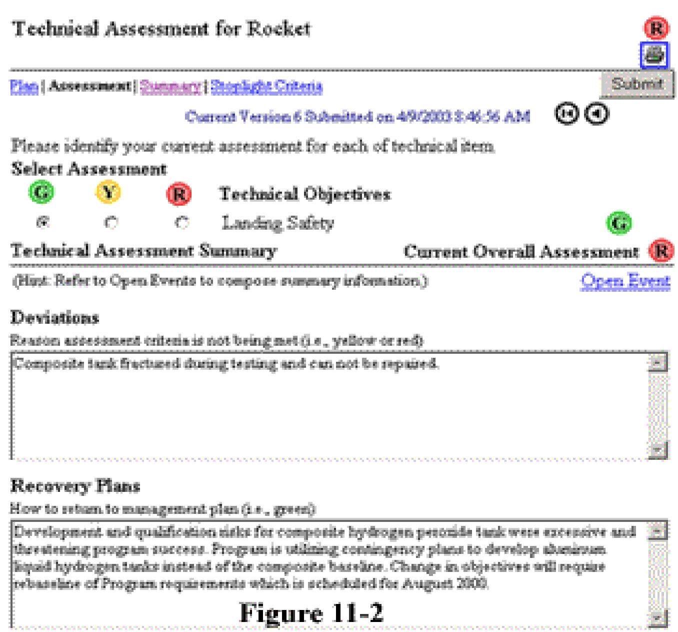


Figure 11-2

To update the assessment, simply select the radio button with the appropriate stoplight color for each of your initiative's objectives and then click on the [**Submit**] button. The overall assessment is automatically calculated based on the worst case of all values selected.

After completing the assessment for each management product, the user can either scroll down the page or click on the [**Summary**] button to complete the Assessment Summary section. Once the fields are completed click the [**Submit**] button to send the information to the database.

Workforce

When [**Workforce**] is selected from the primary menu the Workforce Assessment page appears to the right in the module window. Initially the user must select [**Plan**] to input the work force plan.

From the Workforce Plan page the Manager is able to add a fiscal year (Figure 12-1-A) by entering the four digit year and clicking on the [**Add Year**] button. This will add a fiscal year for cost and work force modules simultaneously.

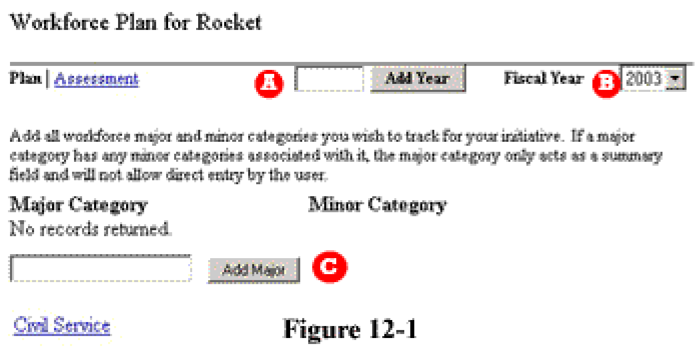


Figure 12-1

After the year desired has been added, the user should select the fiscal year from the drop down menu (Figure 12-1-B) to begin entering the plan.

The Workforce module allows the Manager to define all the major and minor levels needed to adequately track the initiative's costs. The Manager can add a major category by entering a name in the field (Figure 12-1-C) and clicking on the [**Add Major**] button. The same process is used to create minor levels. The Manager can enter a name in the minor category field (Figure 12-1-D) and click the [**Add Minor**] button. When a minor level is added to a major level the major level converts to a 'rollup' summing the minor levels below. Major and minor categories can be deleted using the [**Delete**] button.

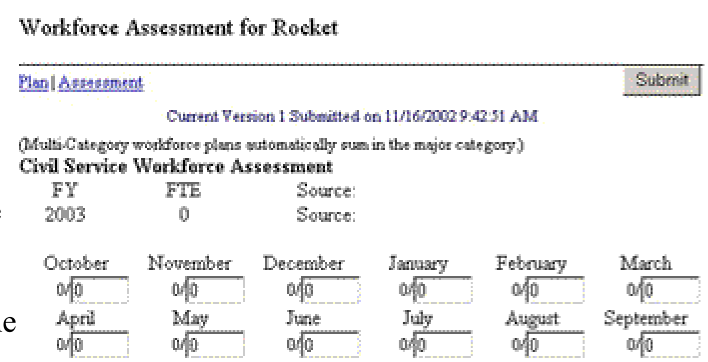


Figure 12-2

Once a level has been added, clicking on the hyperlinked name will open a work force table (Figure 12-2) so that values can be added. In addition to the planned work force Full-Time Equivalents (FTE) the Manager should enter the source of the approved work force plan for reference. Once the fields are completed click the [**Submit**] button to send the information to the database. Selecting the hyperlinked Major level that has Minor levels associated with it will open the monthly work force table for viewing only. The user cannot directly enter values because the Major level only reflects the sum of the associated Minor Levels.

After the Workforce Plan is completed the user can proceed to the Workforce Assessment page by clicking on the [**Assessment**] button. The user will notice only the Major and Minor levels that were created on the Workforce Plan are reflected on the Assessment page (Figure 12-3). To update the assessment, the user simply selects the major or minor category desired and enters the actual data. Once the fields are completed click the [**Submit**] button to send the information to the database.

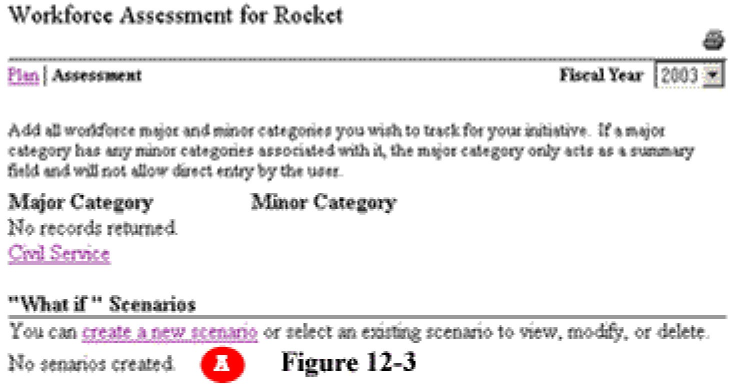


Figure 12-3

The Manager can also use ePORT to consider "what if" scenarios to compare with the approved baseline plan and actual assessments. To use this feature, the Manager simply clicks on the [**Create Scenario**] button (Figure 12-3-A) and enters a label for the scenario.

[**TIP:** *Each new "what if" scenario will copy over the existing planned and actual data to date as a starting point for the Manager to edit*]

After completing the assessment for each management product, the user can either scroll down the page or click on the [**Summary**] button to complete the Assessment Summary section.

Once the fields are completed click the [**Submit]** button to send the information to the database.

Risk Management

Viewing and Managing Risks

The ePORT Risk module allows the user to identify, track and maintain potential risks to an initiative. By default the user is taken to the Risk Index view. See the Risk Index section for more detailed information.

Figure 13-1

Risk is a measure of the potential inability to achieve overall initiative objectives within defined cost, schedule and technical constraints. Risk is made up of two components: likelihood and consequence. Along with identifying risks and documenting the analysis associated with these risks, the user can layout a mitigation plan to reduce or prevent the risk's impact.

The upper right hand corner of the Risk Summary page (Figure 13-1-A) provides a "quick look" summary of all the initiative's open risks categorized by risk criticality (High, Medium and Low). When [**Risks**] is selected from the primary menu the Risk Index page appears to the right, in the module window.

Selecting [**Add**] will take the user to the add risk screen. See the section Adding Risks for more detailed information.

Selecting the **[Status**] button from the module menu (Figure 13-1-B) provides the user with a quick look of the risks' approach status. The user can view individual risks by clicking on a hyperlinked title.

Selecting the [**5x5 Grid**] button from the module menu (Figure 13-1-C) shows the current initiative's top 15 risks and trend for the past 30 days plotted on a color-coded 5x5 matrix. The 5x5 Grid view is also available within the reporting module.

Risk Index

The Risk Index page lists all the risks currently identified for the initiative. The user can limit the risks being viewed by selecting from a list of save search criteria displayed in the drop down box, (Figure 14-1-A).

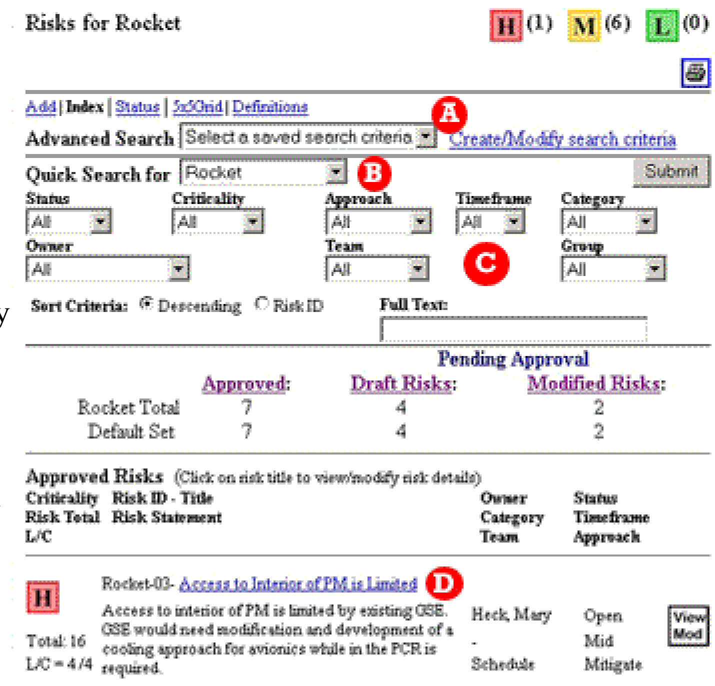


Figure 14-1

The user can also create or modify search criteria by clicking on the hyperlink "Create/Modify search criteria", which will take them to the search criteria page. While the user is viewing risks, they can perform a quick search by just owner by using the quick search option in (Figure 14-1-C) and clicking on the [**Submit**] button.

If the user is viewing risks for a program an additional sort field (Figure 14-1-B) will be displayed allowing the user to show all the program and project risks together or only the program or project risks separately.

[**TIP:** *The default sort for risks used in the online view and report generation is ordered by Status (Open then Closed), risk criticality (***H***,* **M***, or* **L***); total risk score (likelihood times highest consequence); risk bias (sum of the products of each consequence times likelihood); and finally by Risk ID.*]

Clicking on the hyperlinked title of a specific risk (Figure 14-1-D) will allow the user to view the Risk Information Sheet.

Adding Risks

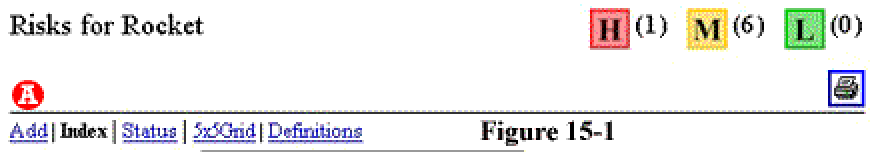
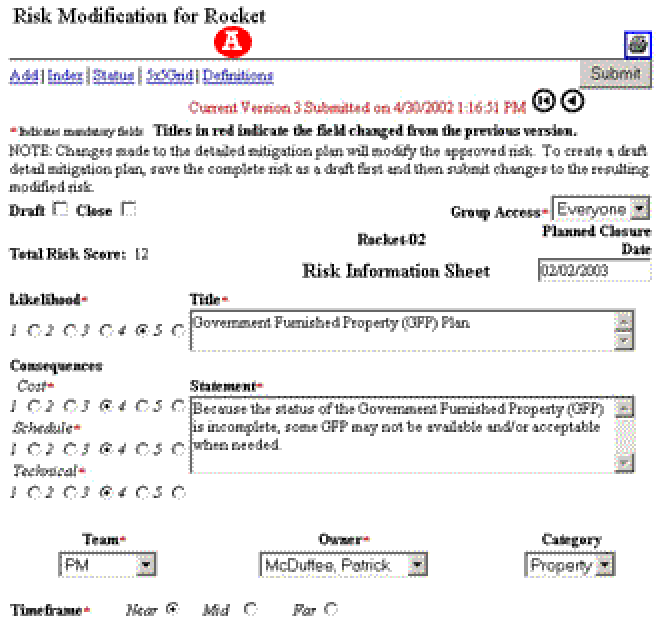


Figure 15-1

By selecting the [**Add**] button (Figure 15-1-A), the Risk Manager can create draft or approved risks and accept or delete Team Member risks. The Team Member can add a draft risk or suggest a modification to an existing risk. Until the Risk Manager takes action on a draft risk by approving or disapproving it, the potential risk will remain under pending risks and will be kept separate from all approved risks. A risk that is no longer possible, or overcome by events, will be closed and archived. A risk that has been realized will be closed and an event will be opened to address the new problem.

To add a new risk select [**Add**] from the module menu and complete the Risk Information Sheet. If the user is a team member the Draft check box will not be visible, since all risks will be entered as draft. The Risk Manager has a choice of entering new risks as draft or approved risks. After completing the Risk Information Sheet form or modifying its contents, selecting the [**Submit**] button will record the data to the database.

Risk Information Sheet



The Risk Information Sheet contains all the detail data associated with the risk. Users can make modifications to the current data commensurate with their privileges.

The [**Definitions**] button (Figure 16-1-A) will show the user a list of all the current definitions (for Likelihood, Consequence, and Time frame) as defined by the Risk Manager. The title, team, owner and category fields are self-explanatory but for remaining fields the following definitions are provided:

Likelihood is defined as the probability of failing to achieve a particular outcome. Valued from 1 to 5 with 5 being the highest likelihood.

Consequence is defined as the impact of failing to achieve that outcome. There are three types of consequences for a given risk – cost, schedule, and technical which are valued from 1 to 5 with 5 being the worst consequence.

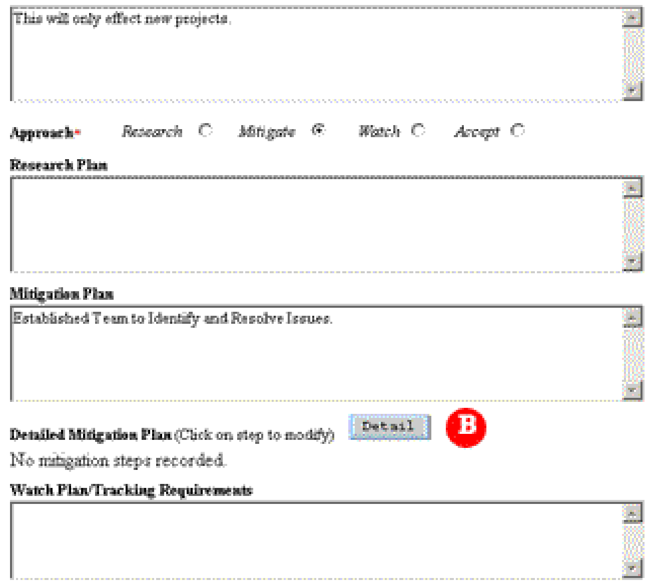
[**TIP:** *There are default definitions provided for Likelihood and Consequence but the Risk Manager has the option of modifying these definitions*]

Total Risk value is the product of the Likelihood and the worst case Consequence.

Time frame is the period when action is required in order to mitigate the risk. There are three time frame options – near, mid, and far for which default definitions are provided, but the Risk Manager has the option of modifying these definitions.

Risk Statement is made of two parts: a condition and a consequence.

> Condition: a single phrase briefly describing current key circumstances, situations, etc. that are causing concern, doubt, anxiety, or uncertainty.
>
> Consequence: a single phrase or sentence that describes the key,



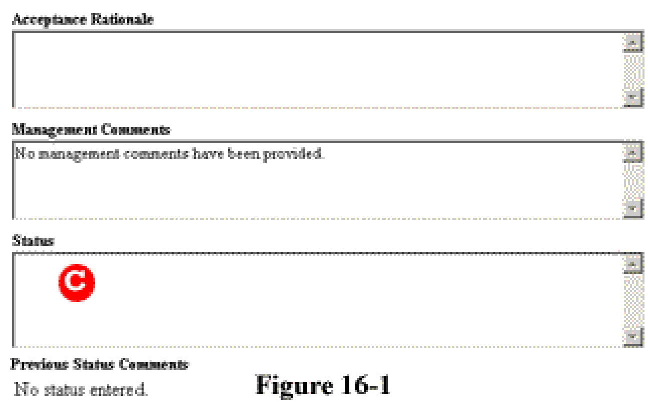


Figure 16-1

negative outcomes(s) of the current conditions.

Context captures the what, when, where, how, and why of the risk by describing the circumstances, contributing factors, and related issues (background and additional information that are NOT in the risk statement).

Approach is how the initiative plans to address the risk. There are four approach options: research, accept, watch and mitigate for which the definitions are provided.

Research: Investigate the risk until you know enough to be able to decide who is responsible for the risk and what approach to take (i.e., mitigate, watch or accept).

Accept: Do nothing. The risk will be handled as a problem if it occurs. No further resources are expended managing the risk. If a risk is marked as “accept”, the user will be prompted to input a mandatory acceptance rationale along with any plans for handling the risk if it does occur.

Watch: Monitor the risks and their attributes for early warning of critical changes in impact, probability, time frame, or other aspects. If a risk is marked as “watch”, the user will input triggers for changing that approach in the Contingency plan/trigger field and any other appropriate/applicable plans.

Mitigate: Eliminate or reduce the risk by reducing the impact, reducing the probability or shifting the time frame. If a risk is marked as “mitigate” the user will input a summery of the mitigation plan in the Mitigation Strategy Summary field and a detailed plan if necessary.

<u>*Research Plan*</u> is a summary of the action plan for risks that are to be researched. It documents the strategies, actions, goals, schedule dates, tracking requirements, and all other supporting information needed to carry out the research strategy.

<u>*Mitigation Strategy Summary*</u> is a summary of the action plan for risks that are to be mitigated. It documents the strategies, actions, goals, schedule dates, tracking requirements, and all other supporting information needed to carry out the mitigation strategy. The [**Detail**] button (Figure 16-1-B) on the risk

modification page takes the user to the detailed mitigation plan page which the user can use to enter a detailed plan for that specific risk.

[**TIP:** *If a risk manager wants to create draft detail mitigation steps they must first create a draft risk. Changes made to the detail mitigation steps of an approved Risk are take as approved detail mitigation steps.*]

Detailed Mitigation Plan screen (Figure 16-4) allows the user to input the separate steps of a detailed plan. The user defines the ID, or step number, a summary of the work to be performed for that step, the person responsible for completing it, the planned completion date and the actual completion date. After entering each step of the detailed plan, the [**Submit**] button will send the data to the database.

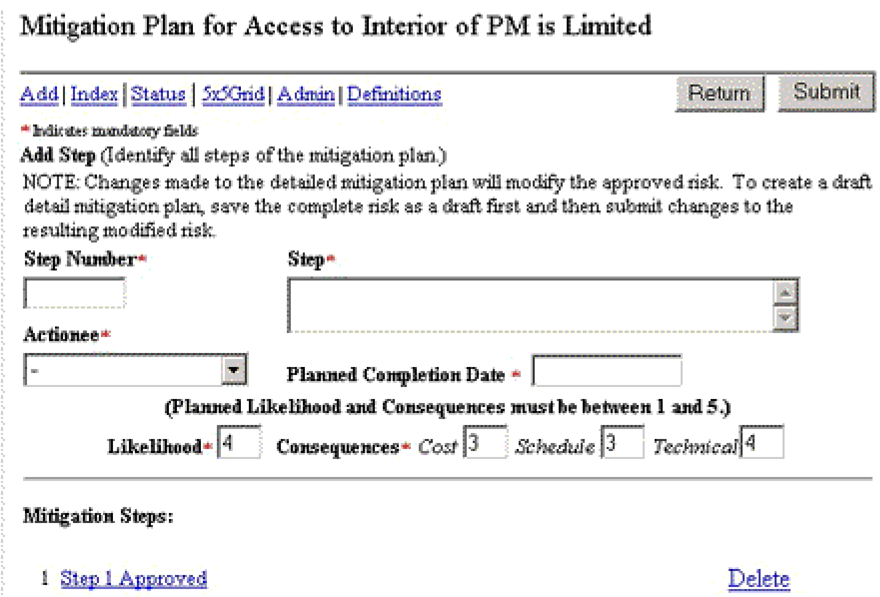


FIgure 16-2

[**TIP:** *If the user creates detail mitigation plans for the risks including the projected likelihood and consequence, a planned versus actual waterfall chart can be selected within the Reporting section to show trends for each risk over time.*]

Watch Plan/Tracking Requirements identifies what future action will cause the initiative to invoke their mitigation plans.

Watch Plan: A plan indicating what indicators are to be watched. The indicators should specifie the level at which an action, such as implementing a mitigation or contingency plan, may need to be taken. Generally used to:

- Provide early warning of an impending critical event
- Indicate the need to implement a contingency or mitigation plan to preempt a problem
- Request immediate attention for a risk
- Closing a risk.

This field can also be used to list contingency plans. Not all mitigation plans can or should be carried out immediately, for example:

There may not be sufficient funding at this time, the appropriate personnel may not be available, or the probability of occurrence is low.

Contingency plans are held in reserve until specific conditions are true or certain events occur – watch for the conditions and events.

<u>*Status*</u> (Figure 16-1-C) provides a field for the user to acknowledge any progress or setbacks in carrying out the mitigation strategy. Previous status information entered is displayed below the entry fields. The system will automatically time tag the status to show when the status was entered.

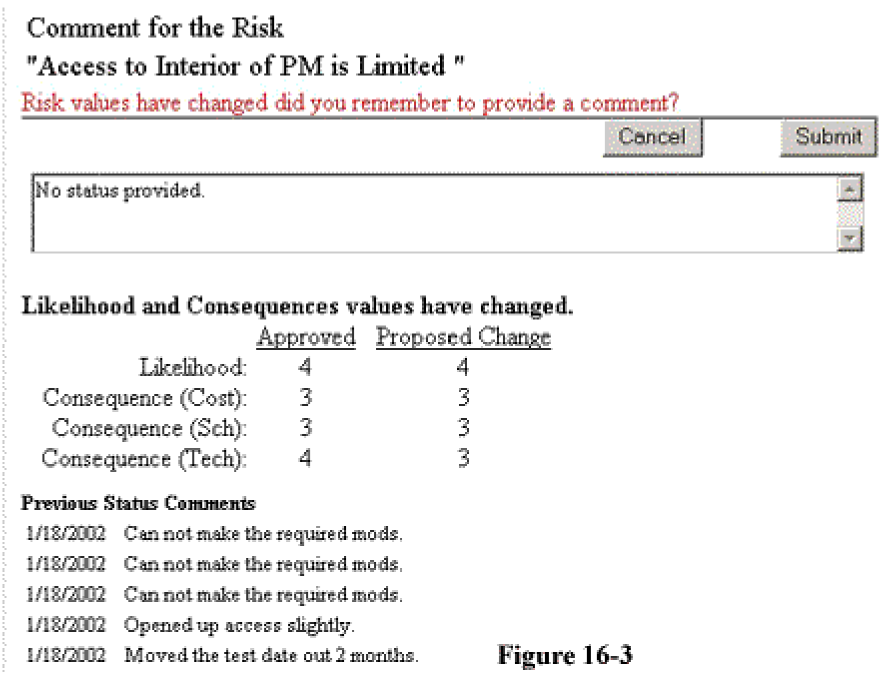


Figure 16-3

When certain key fields on the risk information sheet are modified and submitted the user will be prompted (Figure 16-3) to enter a status that describes the change. A special status comment is required when there is a change to any of the likelihood, consequence, or approach fields or when a risk is closed. A closed risk also requires the risk manager to submit a closure rationale. The Risk Impact is an optional field that allows the risk manager to transfer pertinent data from the risk information sheet to a new event report for the initiative manager's review.

[**TIP:** *Once a risk is closed in the approved, draft or modified mode it can not be modified or be reverted back to open.*]

Events

Events

The Events module is where the user identifies off-nominal conditions affecting the initiative. This is also the area of ePORT where the user is able to layout an implementation plan to reduce or prevent the issues' impact.

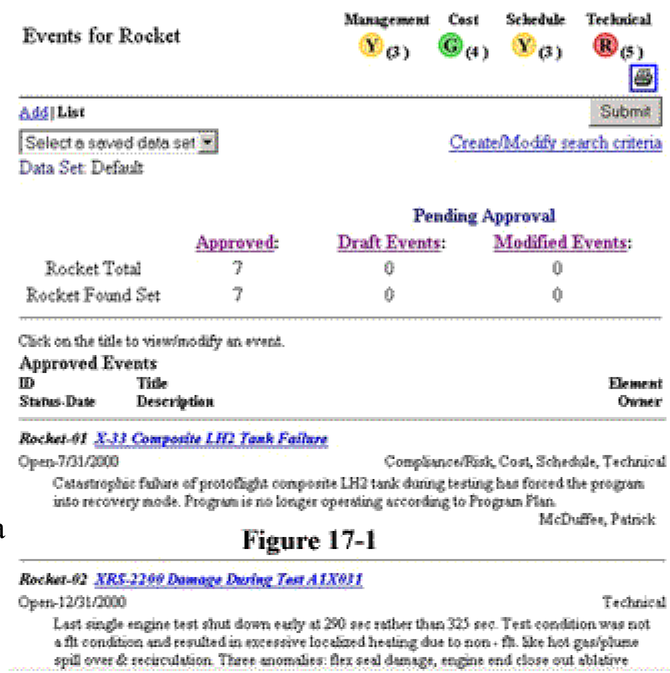


Figure 17-1

When [**Events**] is selected from the primary menu the Events List view appears to the right, in the module window. The Events List page (Figure 17-1) shows all the events currently identified for the project. Clicking on the hyperlinked title of a specific Event will allow the Manager to modify an open event or view a closed event.

Adding an event report can be accomplished by clicking the [**Add**] button, which brings up a blank event report. The user should then enter all applicable data into the form. The same layout is used for both add and modify for the event reports.

There are a couple of exceptions to the layout similarities. The status comments field, which allows for the addition of new status, is in a read only mode on the modify layout for all previous status comments. Meaning new comments can be added but previous comments may not be modified in any manner. Another exception is that the modify layout provides you with the option to close an open event.

These are the events that can be displayed during the summary assessments for the compliance, cost, schedule and technical modules.

Reports

Overview of ePORT Reports

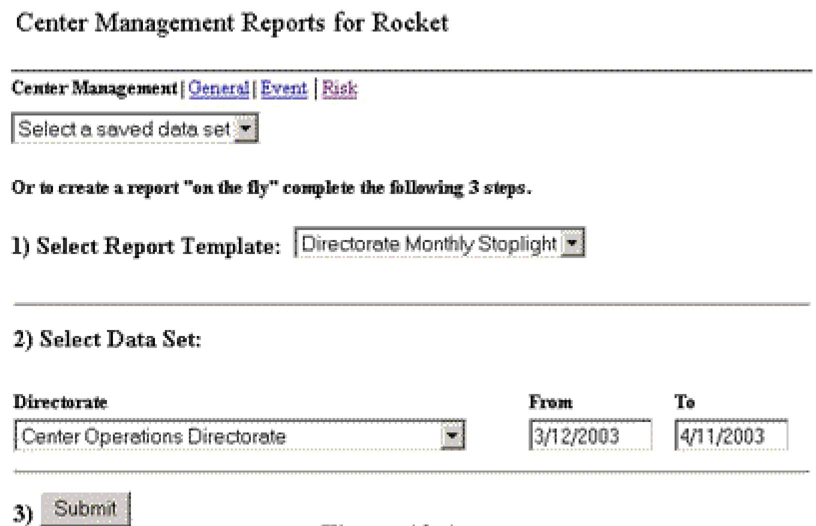


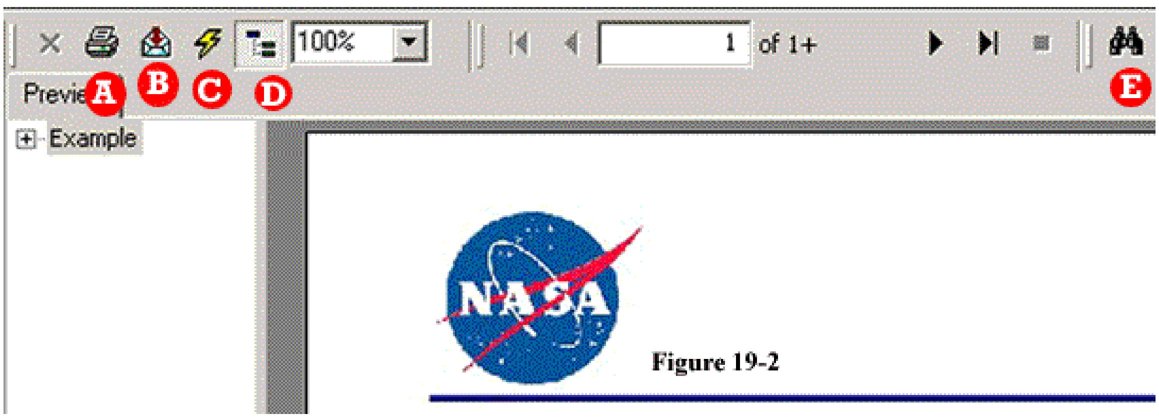
Figure 19-1

The Reports Module provides the user with straightforward access to available reports broken down by categories. Currently there are four categories Center Management, General, Event and Risk. These categories are expected to grow as users identify additional reports required for support their project. After you click the reports tab the user will be directed to the Center Management page. From this page the user can easily access the other categories. Each category has a drop down listing of available reports. Once a report is selected the criteria appropriate for the selected report is displayed and the user can make the data set selection. The criteria selected will remain in a preference storage module to enable the user to view/print multiple reports without having to reenter the same criteria. The reports are generated and displayed through a report generation tool called Crystal Reports.

Crystal Reports Viewer

Using the Active X Crystal Viewer - **Attention PC Users**

(Figure 19-2) depicts the report-viewing window that appears for PC users with each generated report. The window has several options that are available to the user. The print button (Figure 19-2-A) provides the user the ability to print a directly from the current view. The send icon (Figure 19-2-B) allows the user to save the report in a variety of formats including excel and rich text. The lightning bolt icon (Figure 19-2-C) allows the user to refresh the data at anytime. The collapse and expand icon (Figure 19-2-D) provide the user with drill down capability when there is data supporting the selected report. The find feature (Figure 19-2-E) enables the user to search the generated report.



Installing the Crystal Report Viewer - **Attention PC Users**

The first time you attempt to view a report using ePORT, you will be prompted to install the Active X version of the Crystal Report Viewer. This is a one time install that should only take a few seconds to perform. Once the control is installed you will be immediately take to the report you requested. If you receive and error message stating that installation of the viewer has failed, it could be that you do not have read/write permission to change the system registry. Log out and log into your PC using an Administrator account so that you have permission to install software. Then try viewing the report again.

Using the DHTML Crystal Viewer - **Attention Macintosh Users**

Macintosh users not be prompted to install and Active X viewer. Instead you will be shown and DHTML viewer as shown in (Figure 19-3.) This viewer will offer most of the functionality as the Active X viewer but will not require the installation of any additional components. (Figure 19-3) depicts the report-viewing window that appears for Macintosh users with each generated report. The window has several options that are available to the user. The print button (Figure 19-3-A) provides the user the ability to print a directly from the current view. The send icon (Figure 19-3-B) allows the user to save the report in a variety of formats including excel and rich text. The lightning bolt icon (Figure 19-3-C) allows the user to refresh the data at anytime. The collapse and expand icon (Figure 19-3-D) provide the user with drill down capability when there is data supporting the selected report.

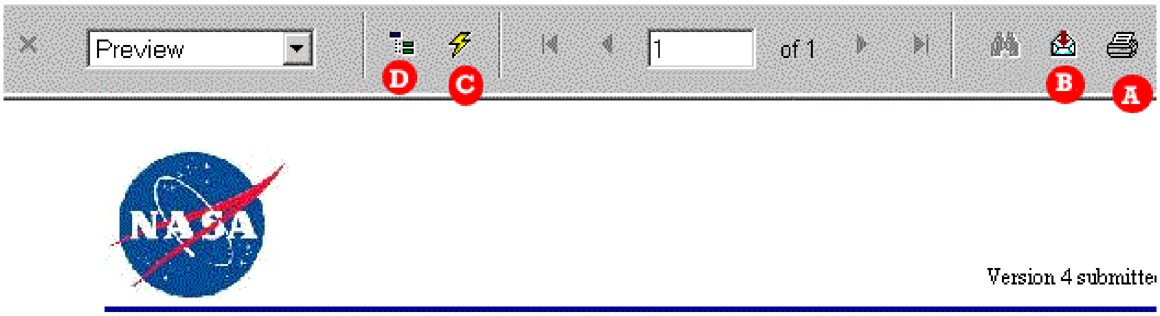


Figure 19-3

Using Report Criteria

ePORT allows users to choose certain criteria to build a report. All reports allow selection of program, project or directorate name. Some reports also provide the opportunity to select a date range if applicable or a fiscal year if necessary. Data is then sorted and displayed accordingly in the report that was selected. If a Program/Project report had been selected, a list of programs and projects available to the specific user would be displayed. The date range should be entered as a normal date (example 2/1/2001 or 02/01/2001). The Fiscal Year may or may not be required as an entry, only on reports where charting and trending occurs does a user need to enter that data. The selection criteria will change based upon which report a user has chosen. Once all fields have been addressed the user should click the Submit button and the report will then be generated in a the Crystal Report Viewer inside a new browser window. (Figure 20-1) shows criteria associated with the 5x5 Grid report under the risk section.

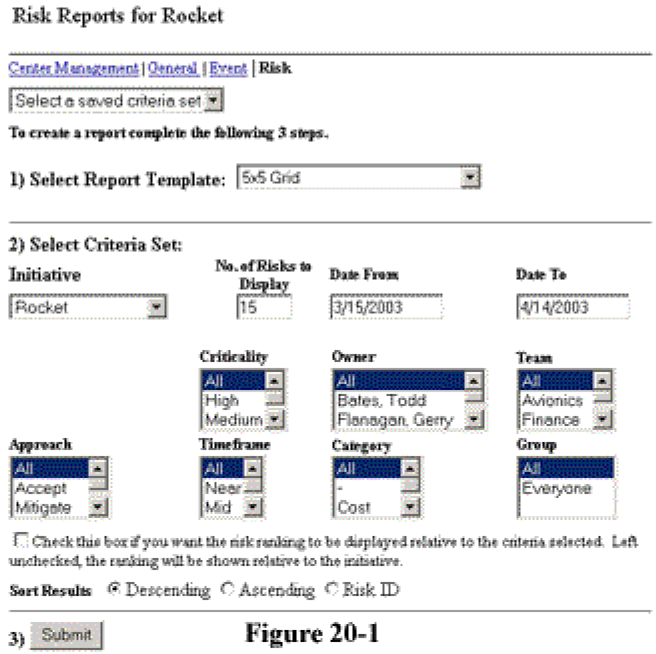


Figure 20-1

[**TIP:** *If no data is entered in the fields the default values are as listed Date Range is today's date and thirty days past, the fiscal year is the current year. The most recent set of selection criteria will be set as the default.*]

The results of any criteria selection will be sorted by descending criticality by default. The options for sorting show in (figure 20-1) are Descending, Ascending and Risk Id. Descending means risks will be sorted with the highest criticality ranked first and the lowest criticality ranked last. Ascending is the exact opposite. The lowest criticality gets ranked first and the highest criticality is ranked last. Sorting by Risk Id just puts risks in order by their ID number with no regard to criticality. This will typically result in risks being sorted by their age with the older risks being ranked first and the new risks ranked last.

Downloading Reports

Reports can be downloaded using the crystal viewer's exporting tool. Click on the Export Report button located on the Crystal Report Viewer tool bar just below the Internet Explorer address bar and directly to the left of the print button. The Export button has a picture of an open envelope as its icon. See figure 21-1 below.

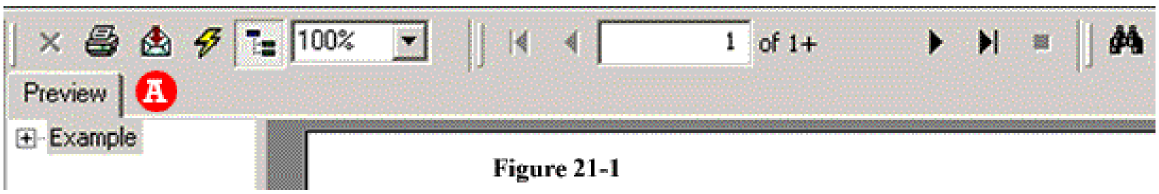


Figure 21-1

A file save as dialog box will open once you click the export button, (Figure 21-1-A). Enter a name and select the location you want to save the file to. The reports format can also be selected here. See figure 21-2. After naming the report, selecting the format and location, click the save button.

[**TIP:** *Report can be downloaded in a variety of formats including Adobe Acrobat, word, Rich Text and as excel spreadsheets.*]

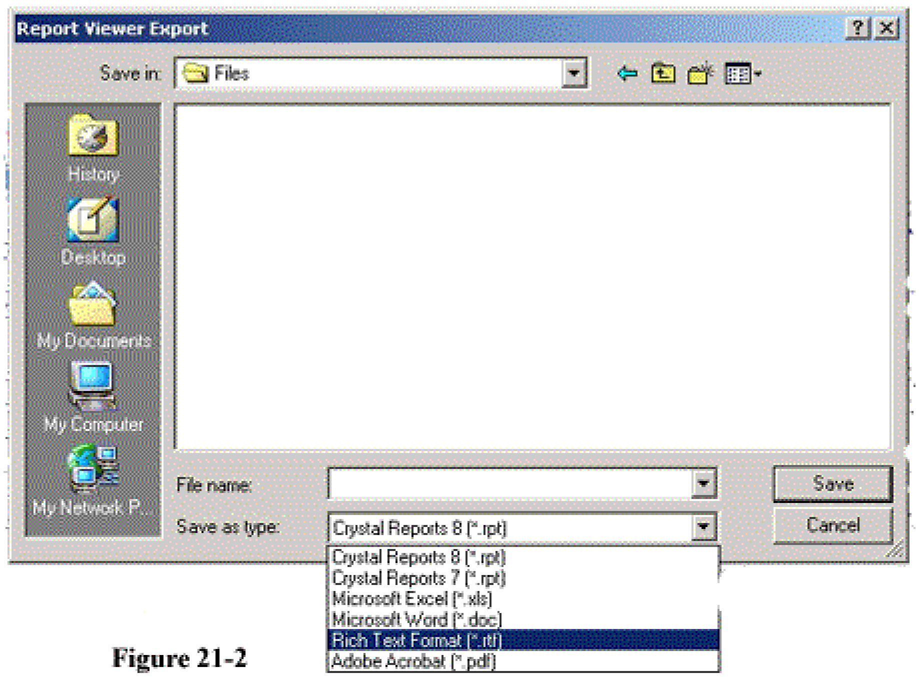


Figure 21-2

Steps For Downloading Reports

- View the report you want to download.
- Click the export button on the crystal viewer tool bar.
- Enter the name you want to save the report as.
- Select the format you want to save the report in from a drop down list.
- Select the location you want to save the report to.
- Click the save button.

Attention Mac Users

While Rich Text format, rtf, provides a clean copy of reports for the PC, it may not appear as clean on when viewed on the Macintosh. This is an issue with how MS Word for the Macintosh renders graphics in Rich Text format. Formats that will work well with the Macintosh for off-line viewing are pdf and HTML.

Attention PC Users

PC users that would like to view reports in their original format or would like to export their reports to HTML may do so using the Crystal Off-line viewer. The viewer may be downloaded from the log-in screen. Once downloaded, the viewer will have to be installed on your system. Once installed, reports may be viewed in their original Crystal document format. For more information on using the Crystal Off-line Viewer, please refer to the section Crystal Off-line Viewer.

Power Point Users

Sometimes you may want to include a report or elements of a report in a power point presentation. To accomplish this task, the report must first be downloaded to a format the users computer can read and understand. This means exporting the report to another format as described in section, Downloading Reports. Reports can be included into Power Point presentations from a variety of formats.

Adobe pdf Documents

Reports can be converted into a Power Point friendly format using Adobe Acrobat but this requires the user to have a **full version** of Adobe Acrobat, not just the Acrobat reader.

Open your pdf report in Adobe Acrobat and then save it as a png graphic. The png format will break each page of the report up into a separate graphics file. Each page will become a separate image. From power point select Insert, picture, from file. Then select the png graphic you wish to insert and you will have a perfect picture of one page of the report now in a power point slide. The graphic can be resized to fit your needs.

Rich Text Format Documents

Formats such as the MS Word doc and rtf, Rich Text Format, can easily be used in Power Point Presentations. First you must separate your rtf document into separate files for the pages you want to include. The easiest way to accomplish this is to copy the rtf document you want to include and save it as a new file. Then delete all pages from the file except the page you want to include in the presentation.

Insert you prepared document into power point by selecting, Insert, ole object and browse to the file you want to select while in Power Point. Once inserted the document may be resized or edited directly on the Power Point slide.

HTML Documents

An HTML document may be included in a Power Point presentation by creating a hyperlink from a piece of text or object on the Power Point slide and link it directly to the HTML document that has been downloaded from ePORT. Once down a hyperlink is created. By running your slide show, you will be allowed to click on your hyperlink and load your html report in Internet Explorer. Remember that hyperlink to external files does not embed the document in the Power Point slide the way inserting images and objects does. If you happen to move or email your presentation to another location, then the html documents being used and accompanying images will also have to be moved to that same location.

MS Excel Spread Sheets

Excel spread sheets, xls, can also be inserted directly into Power Point slides in the same manner that rich text documents are inserted. While in Power Point, click on the insert menu item, then ole object and browse to the file you want to insert. Once selected the spread sheet will appear on your Power Point slide.

Report Levels

Report Levels

Currently the levels available are Center Management, General, Event and Risk.

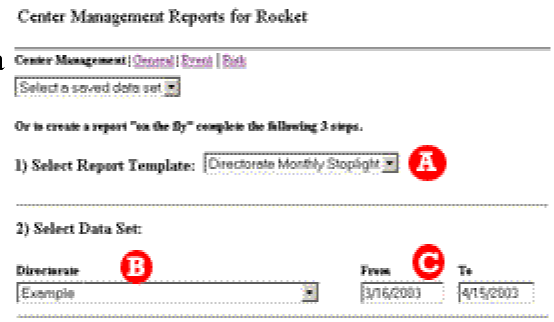


Figure 22-1

The Center Management Reports section contains reports that are at a very high level, a top-level view of the entire center. These reports might be a roll-up of lower level reports. Figure (22-1-A) is the drop down menu that allows you to select the report that you want. Unlike all the other reports that respond simply to choosing an initiative from the main menu drop down box, the Directorate report only responds to the directorate listed in the drop down menu shown in Figure (22-1-B). Figure (22-1-C) is a date range for the report. By default the to date will be the current date and the from date will be 30 days back.

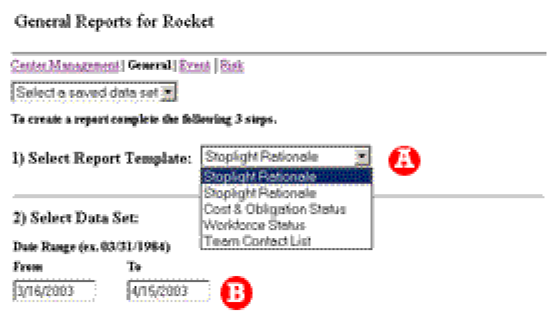


Figure 22-2

The General Reporting section contains reports on a broad scope within the initiative. The current reports are the Stoplight Rationale Report, Cost and Obligation Status, Workforce Report and the Team Contact List. Figure (22-2-A) shows the drop down menu where the report can be selected.

Figure (22-2-B) displays search criteria available. Available criteria will be change based on the report selected

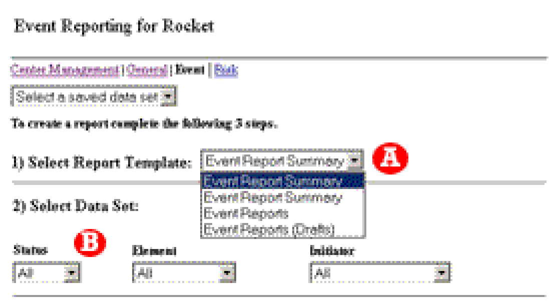


Figure 22-3

The Event Reporting section contains all event data. The reports included here are the Event Report Summary, Event Reports and the Event Reports (Draft).

Figure (22-3-A) displays the reports available from the drop down menu.

Figure (22-3-B) shows the criteria available to the events sections.

The Risk Reporting section contains all reports needed to manage risks and risk plans. Reports included here are Index, Status, 5x5 Grid, Risk Overview, Risk Overview with Range, Risk Worksheet, Risk Open vs Closed, Risk Information Sheet, Risk Information Sheet (Drafts), Planned Vs Actual Waterfall, Mitigation Action Items, and Deleted Risks.

Figure (22-4-A) shows the drop down menu that allows the user to select a report.

Figure (22-4-B) shows criteria available for a selected report. The available criteria will change based on what report is selected.

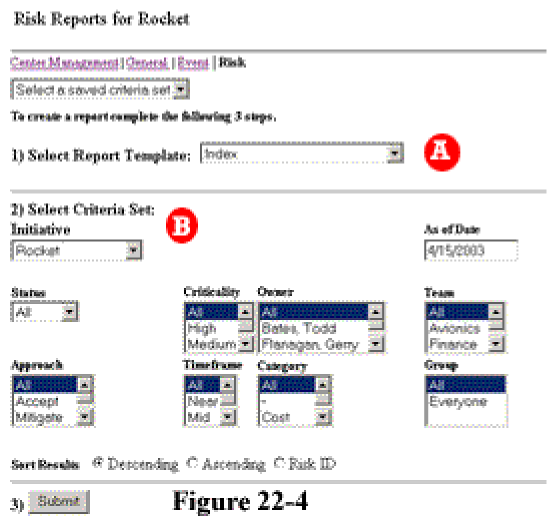


Figure 22-4

Center Management Reports

The Center Management Reports section currently contains only one report, the Directorate Monthly Stoplight Report. This report takes all the programs, projects and activities in a directorate and displays the high-level stoplight chart for each element per initiative. Following the stoplight charts is a written status on each element from each program or project within the directorate. These comments originate from the Compliance, Cost, Workforce and Schedule Assessment pages where a user has entered the deviations and recovery plans. A trending chart is located at the end of the report summing up all cost and work force data for the initiative.

Figure 23-1

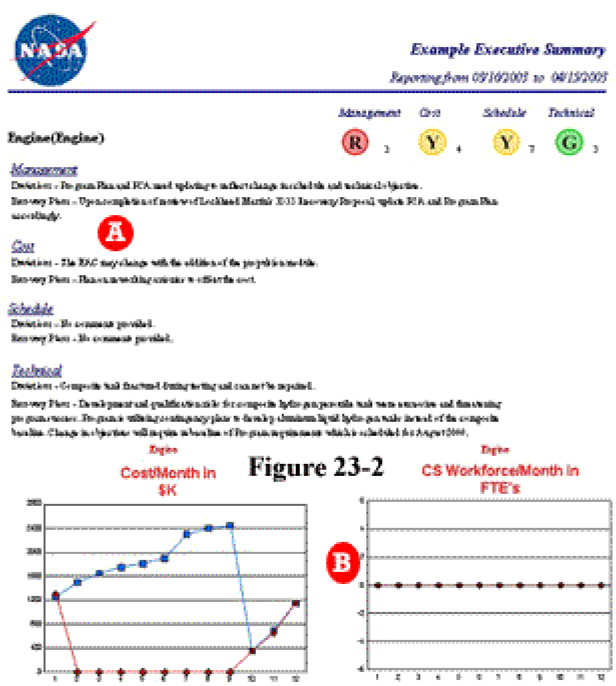


Figure 23-2

- Figure (23-1-A) shows the directorate name.
- Figure (23-2-B) shows the date range being used for this report.
- Figure (23-2-A) shows the deviations and recovery plans for each element in an initiative.
- Figure (23-2-B) shows the Cost and Workforce data for the

initiative.

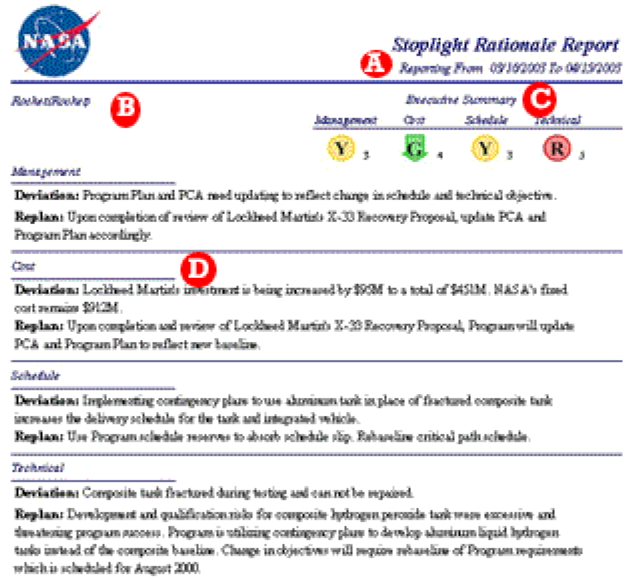
- Figure (23-3-C) shows the Program name
- Figure (23-4-D) shows the program's projects.
- Figure (23-5-E) shows the stoplight trend for each initiative.

General Reporting

<u>Stoplight Rationale Report</u>

The Stoplight Rationale Report consists of the same information displayed in the Directorate Report but without the trending chart. This report displays data for the initiative you are currently viewing instead of the entire Directorate.

The date range for the report is displayed on (Figure 24-1-A). This date range can be specified by the user. (Figure 24-1-B) shows the name and acronym for the initiative selected. The initiative's stoplight trending elements are displayed on (Figure 24-1-C) and the deviation and recovery plans are displayed on (Figure 24-1-D).


Stoplight Rationale Report

Executive Summary

Management Cost Schedule Technical

Management

Deviation: Program Plan and PCA need updating to reflect change in schedule and technical objective.
Replan: Upon completion of review of Lockheed Martin's X-33 Recovery Proposal, update PCA and Program Plan accordingly.

Cost

Deviation: Lockheed Martin's investment is being increased by $95M to a total of $451M. NASA's fixed cost remains $912M.
Replan: Upon completion and review of Lockheed Martin's X-33 Recovery Proposal, Program will update PCA and Program Plan to reflect new baseline.

Schedule

Deviation: Implementing contingency plans to use aluminum tank in place of fractured composite tank increases the delivery schedule for the tank and integrated vehicle.
Replan: Use Program schedule reserves to absorb schedule slip. Rebaseline critical path schedule.

Technical

Deviation: Composite tank fractured during testing and can not be repaired.
Replan: Development and qualification risks for composite hydrogen peroxide tank were excessive and threatening program success. Program is utilizing contingency plans to develop aluminum liquid hydrogen tanks instead of the composite baseline. Change in objectives will require rebaseline of Program requirements which is scheduled for August 2000.

Figure 24-1

<u>Cost and Obligations Status</u>

Cost and Obligation Status displays cost data such as cumulative cost and cumulative OBS planned vs. actual, EOY Estimates, and civil service workforce. A chart is included on this report that displays the cost and OBS planned vs. actual for trending purposes.

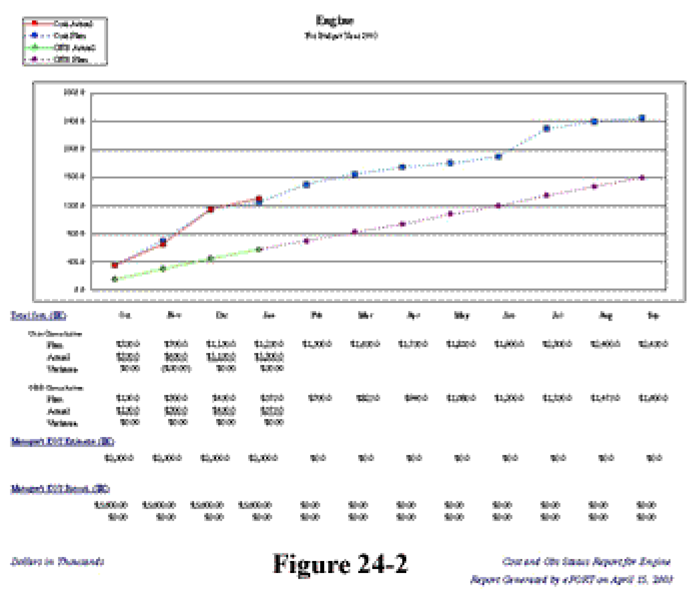


Figure 24-2

Workforce Report

The Workforce Report displays Civil Service workforce data as well as contractors workforce numbers. This report also contains a chart showing the trending between planned vs. actual of the total contractor data.

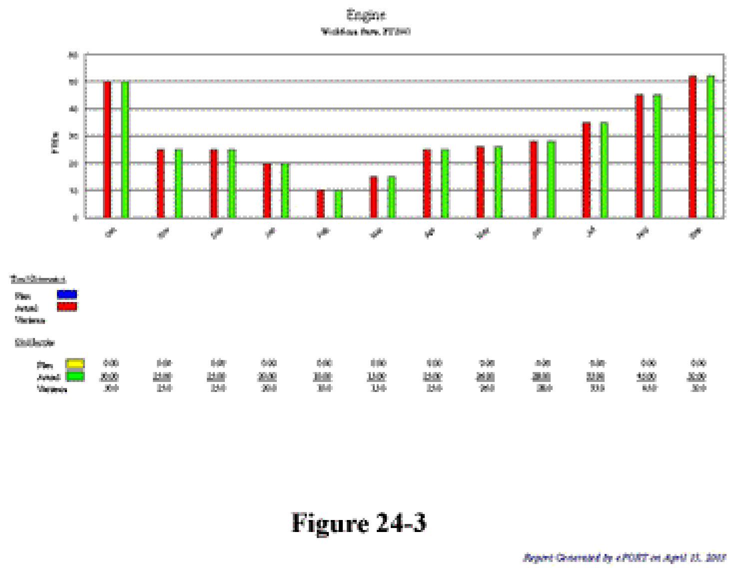


Figure 24-3

Team Contact List

Team Contact List is a list of all team members associated with a particular initiative. It also identifies and lists contact information for the Project Manager, Alternate Project Manager, Lead Systems Engineer and Risk Manager.

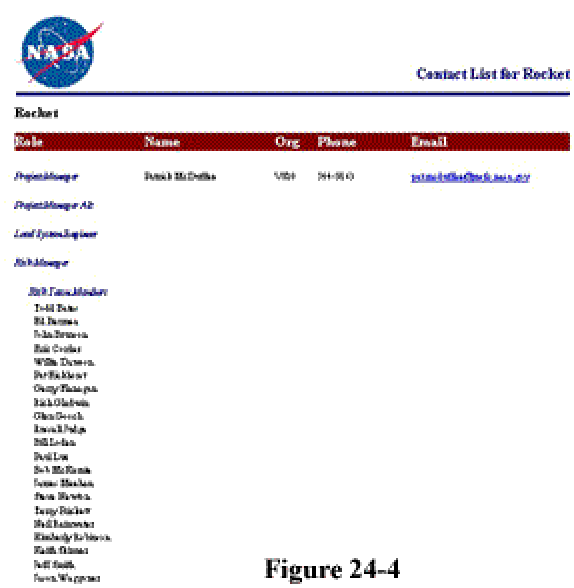


Figure 24-4

Event Reporting

<u>Event Report Summary</u>

The Event Report Summary lists all the approved events with in a given initiative.

Figure (25-1-A) displays the Management, Cost, Schedule and Technical stoplight trending for the initiative.

Figure (25-1-B) lists all the approved events with in this initiative.

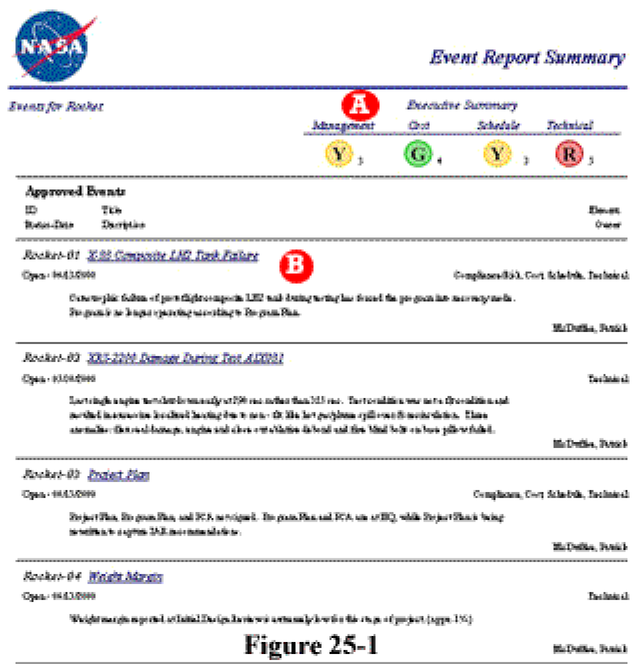


Figure 25-1

<u>Event Reports - Approved</u>

The Event Report is a detailed breakdown of an event. Much like the Risk Information sheet is shows all the data associated with a particular event. The Event Report only displays approved events and only shows the most recent revision of a particular event.

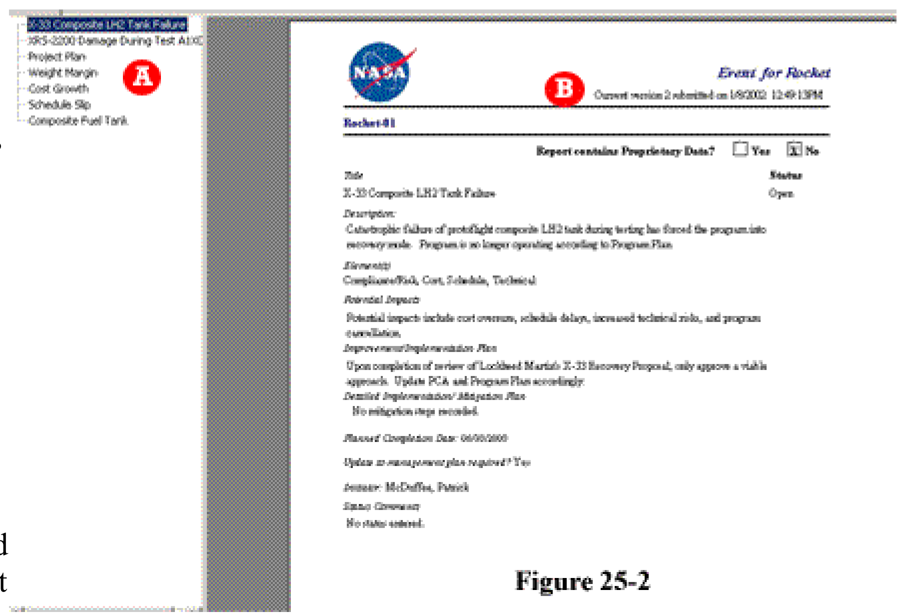


Figure 25-2

Select the event you with to see from the list on the left, figure (25-2-A). Once you click on an event name from the left menu, the event report will appear on the right.

Figure (25-2-B) displays the current revision number and the date that the event was last revised. Only the most current revision will be displayed in this report. To see previous revisions of particular events, please refer to the Events section.

Event Reports - Draft

The Event Report (Draft) is the same as the event report except that it only displays draft events. The word "Draft" is water marked on the report, Figure (25-3-A) as well as displayed at the top of the report.

Just like the Event Report, the Event Report (Drafts) will show all draft events for a particular initiative. By clicking on a list to the left of the report window, as seen in (Figure 25-2-A), the event selected will appear in the window on the right.

This view provides only the most current revision of an event. To view past revisions or an event or to get a print out on just one event, please refer to the print views in the Events section.

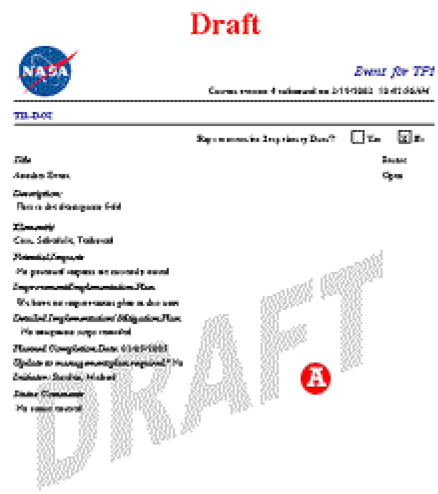


Figure 25-3

Risk Reporting

Risk Index Report

The Risk Index report is a leading report that shows all the risks for a given project in a list format with general key information.

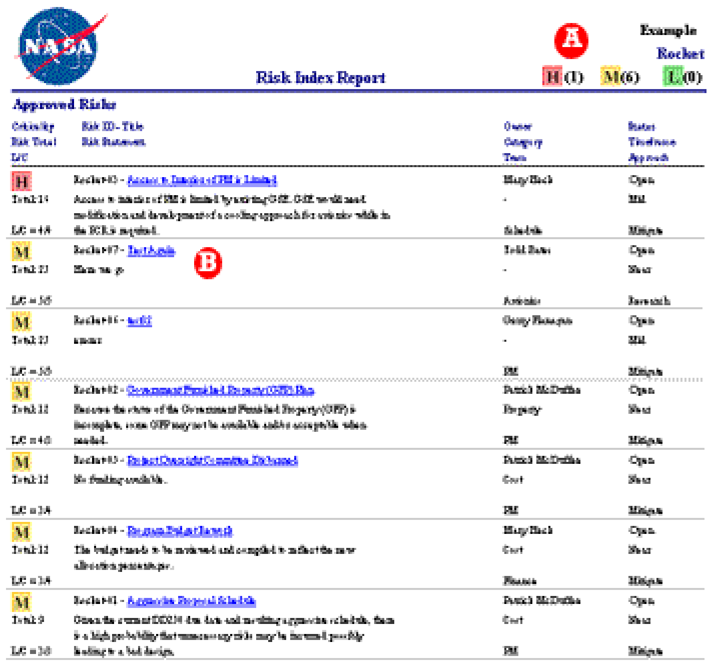


Figure 26-1

Figure (26-1-A) shows the name of the Directorate, "Example", the name of the initiative, "Rocket", and current count of the number of open risks shown on this report by criticality.

In figure (26-1-B), risks for this initiative are listed some along with some key information concerning each risk. By default, risks are sorted by criticality in descending order, with highest criticality open risks first and the lowest criticality last, closed risks are tacked on to the end of the list and ranked accordingly.

For more information on sorting by criticality please refer to the Risk Index section.

For more information on filtering report data or changing the sort order please refer to the section Using Report Criteria.

Risk Status Report

The Risk Status report shows in a graphical and textual format how all risks for a given project have changed over the course of time. Every change made to a risk is archived and can later be shown by this report. The status report can have its results limited to the top N

Figure 26-2

results with N being the number of risks the user wishes to see.

Like the Index report, the status also shows the directorate name, initiative name and provides a risk count by criticality in the upper right hand corner, figure (44-A).

Risks are listed down the report sorted by criticality. The default sort being the most critical ranked first and the least critical ranked last, figure (44-B).

For more information on sorting by criticality please refer to the Risk Index section.

For more information on filtering report data or changing the sort order please refer to the section Using Report Criteria.

5x5 Grid Report

The 5x5 Grid Report contains a grid chart as seen below in (Figure 26-3) that quickly identifies in picture form where the top 15 risks are located in the project's defined risk structure. EPORT suggests guidelines for each project to follow but the overall risk grid structure is customizable to each individual project.

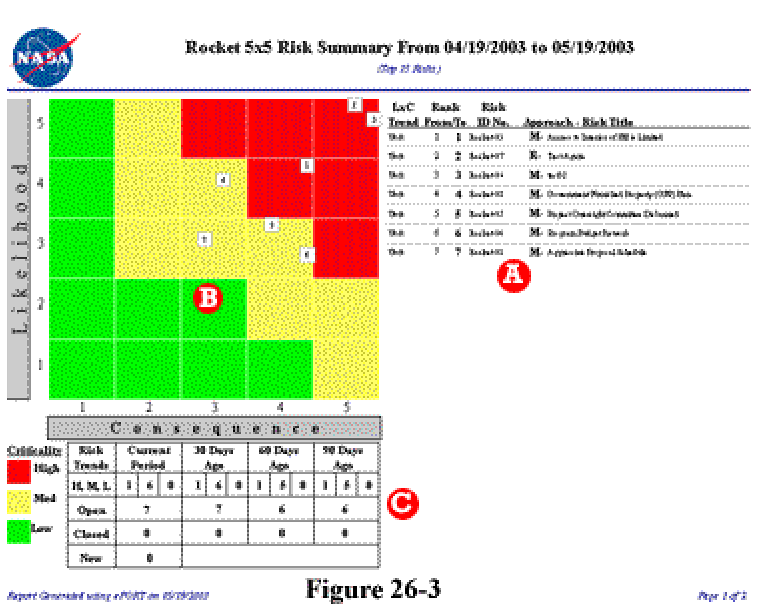


Figure 26-3

This report is composed of three elements. (Figure 26-3-A) is a list of risks that are being ranked on this report. This list includes:

- The risk title and identification number
- Its rank at the beginning and at the end of the period.
- A graphic showing if the risk is:

NEW- New since the last period

Unch - Unchanged since the last period

- Criticality has increased since the last period

- Criticality has decreased since the last period

In figure (26-3-B), the risks are plotted on a grid in accordance with their rank. Figure (26-3-C) gives a quick look at how many risk are open, closed and new in the current period as well as how many were open and closed 30, 60 and 90 days ago. These numbers reflect totals for the initiative and not just the risks being ranked. The 5x5 Grid report only ranks the top 15 risks but can be limited to less than 15 by applying various criteria. For more information on the 5x5 Matrix set up and color definitions please refer to the section Matrix Setup.

Risk Information Sheet

The Risk Information Sheet is a basic report depicting all the risk information available for the selected project. Each risk is broken into its individual sheet, but all risks for a given project are contained in the same report. Risks may be selected from a window on the left and that risk will then be displayed in the window on the right in the format shown in (Figure 26-4).

Figure 26-4

The Risk Information Sheet report will only show the last revision made to a particular risk. Previous revisions of risks are kept and can be viewed from the Risk section of ePORT.

Printing the Risk Information sheet report will result in printing all the risks for a particular initiative. If you want to print a particular risk then please refer to the print view of the Risk Information Sheet found in the Risk section of ePORT.

Also the Risk Information Sheet only shows approved risks. To view Draft Risks you must refer to the Risk Information Sheet (Drafts).

Risk Information Sheet (Drafts)

Risk Information Sheet (Drafts) is a basic report depicting all the draft risk information available for the selected project. Each risk is broken into its individual sheet, but all risks for a given project are contained in the same report. Risks may be selected from a window on the left and that risk will then be displayed in the window on the right in the format shown in (figure 26-5).

Draft Risks can be easily identified by word "Draft" water marked in the background of the report and in red across the top of the report as in (figure 26-5).

The Risk Information Sheet report will only show the last revision made to a particular risk. Previous revisions of risks are kept and can be viewed from the Risk section of ePORT.

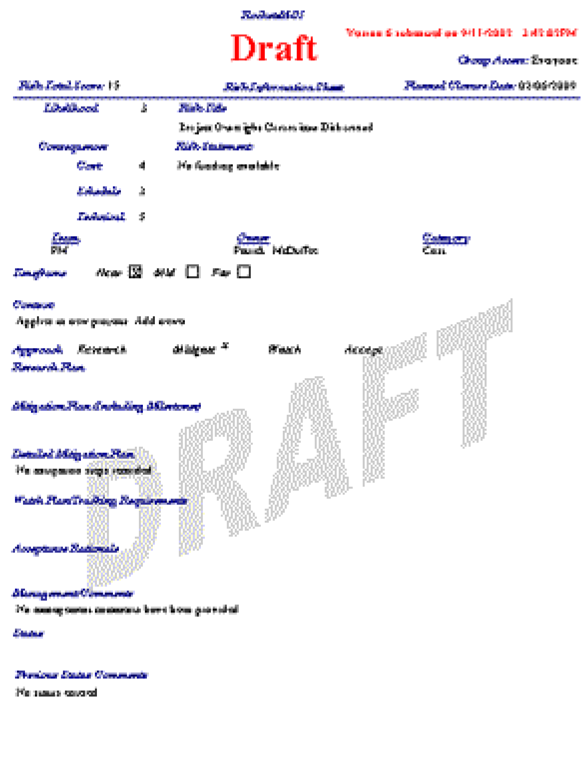


Figure 26-5

Printing the Risk Information sheet report will result in printing all the risks for a particular initiative. If you want to print a particular risk then please refer to the print view of the Risk Information Sheet found in the Risk section of ePORT.

Risk Overview Report

The risk overview report provides a highly detailed list view of an initiatives's risks ranked according to criticality.

This report provides more information than the Index and Status reports but less detail then the Risk Information sheet.

It allows the users to get a highly detailed view of

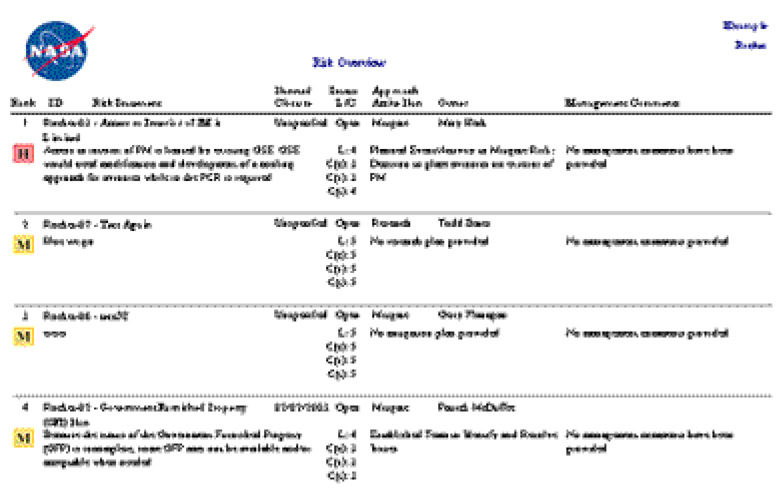


Figure 26-6

their individual risks while viewing them in context with other risks in the initiative.

<u>Risk Overview Report with Range</u>

This is same report as the Risk Overview but with a slightly different result set. This report requires a date range where the Risk Overview only requires an end date. Risk Overview with Range not only returns open risks ranked by criticality but also shows all risks that closed during that period.

<u>Risk Work Sheet</u>

The Risk Work Sheet is a list summary view of risks and how they rank in their initiative. This is a graphics free, tabular report designed to easily port over to Microsoft Excel and used in a spread sheet.

To learn more about exporting reports to other formats please refer to the section, [Downloading Reports](#).

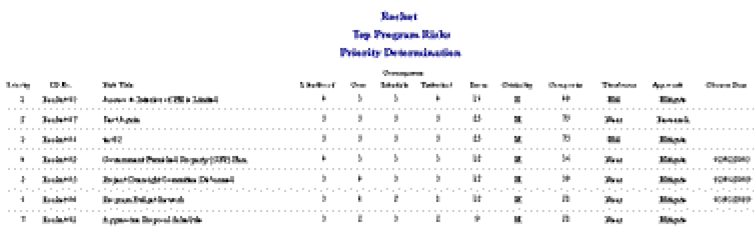


Figure 26-7

<u>Plan Vs Actual Waterfall</u>

A graphical depiction of the life cycle of a risk using the detail mitigation plan likelihood and consequences as compared to the actual likelihood and consequences.

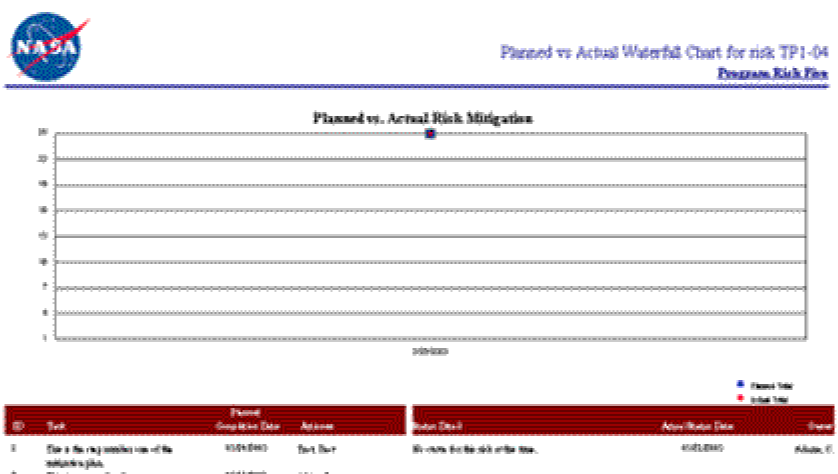


Figure 26-8

Mitigation Action Items

The mitigation action items report provides a list of tasks that need to be completed and their expected completion date. Once an items passes its completion date and has not been completed then that item will be marked with a red asterisk.

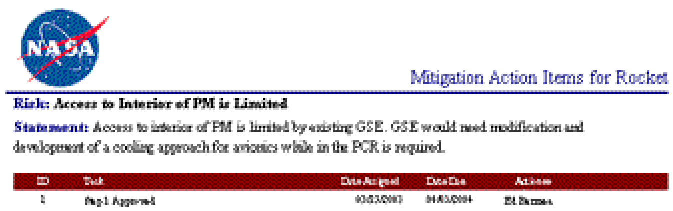


Figure 26-9

Deleted Risks Report

The Deleted risks report provides a list of all deleted draft and mod risks. Since a risk may have multiple draft and mod versions, only the last revision to be modified or updated in draft mode will be shown.

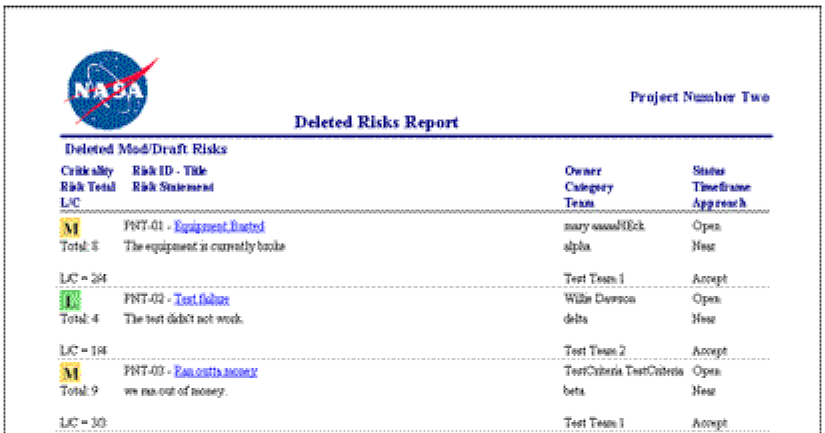


Figure 26-10

Risks are sorted on the report in descending order by their deleted date. The most recently deleted risks will appear at the top of the report and older risks will be listed towards the bottom.

Risk Open vs Closed

This report displays the total number of open and closed risks for an initiative. This total is then broken down by the number of open risks per team per approach type as well as the total number of high, medium and low risks and high medium and low risks per team per approach.

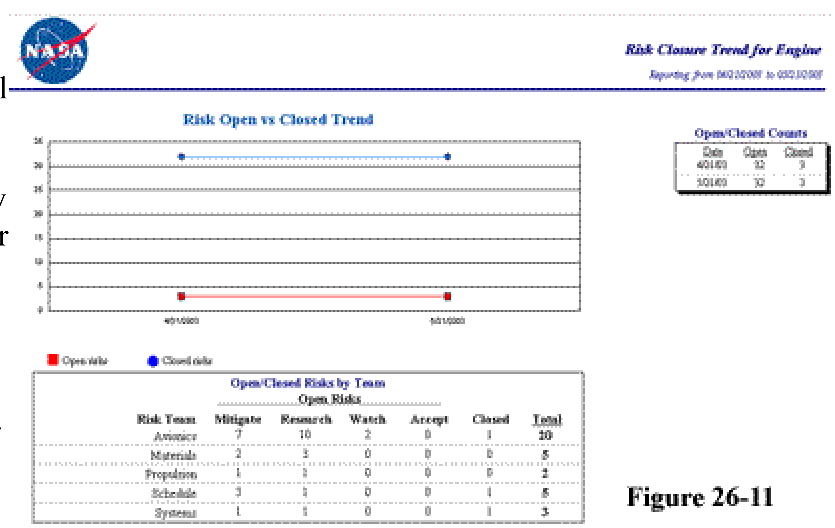


Figure 26-11

Page one of this report details open vs closed risks while page two compares the High, Medium and Low criticality of risks.

Admin Functions

Initiative Admin - Mode Selection

The Admin Module is only available to the initiatives' manager and defaults to the mode screen (Figure 27-1). The mode screen provides the ability to select which mode in which the initiatives Plans and Assessment modules will operate. To access this module, click on the PGM/PRJ Admin link from the Setup section of the main menu.

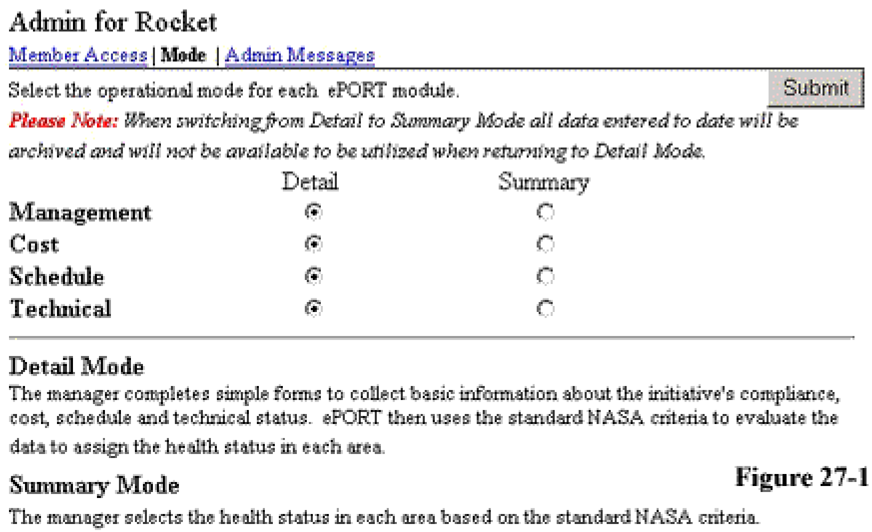


Figure 27-1

The Full Mode, which is the preferred method, enables the manager to enter specific planned and actual data that is used to automatically assess the initiative based on current agency criteria.

The Abbreviated mode allows the manager to enter basic information and select their own assessment guided by current agency criteria. The manager can select a different mode for each module or use the same mode for all the modules.

[**TIP:** *When moving from the full mode to the abbreviated mode all data entered in the full mode is archived and no longer available for modification if the mode is switched back to full mode.*]

Appendix

Stoplight Guiding Principles

Stoplight assessments are based on approved Program/Project Plan.

G Green represents Progress according to Plan

- Meeting management plans or commitments
- No action required

Y Yellow represents an Area of concern

- Deviating from plans or commitments, but approved contingency/ reserves exists to recover and successfully complete the program/project as planned
- Needs attention, problem can be resolved internally

R Red represents a Significant problem

- Deviating from plans or commitments, with insufficient approved contingency/ reserves to recover and successfully complete the program/project as planned
- Needs immediate action, external help required to address the problem.

Stoplight Criteria

Compliance

Evaluate all Program/Project management planning and processes for completeness, accuracy, and compliance to NPG 7120.5 and MSFC Management System (MMS) instructions (e.g., MPG 7120.1). Risk management is highlighted due to its importance as a management strategy and should be thoroughly addressed.

- Green - Plans, processes and risk management approach adequately satisfy Agency and MSFC Program/Project Requirements.
- Yellow - Plans, processes and risk management approach do not adequately satisfy Agency and MSFC Program/Project requirements but issues are being addressed with a scheduled completion date and can be accomplished internal to the initiative.
- Red - Plans, processes and risk management approach do not adequately satisfy Agency and MSFC Program/Project requirements and issues are not being addressed or can not be accomplished without help external to the initiative.

Cost

Evaluate how the Program/Project budget is performing against the approved Program/Project planning, including cumulative annual cost and reserves documented within the Program/Project Plan and monthly resources documented in phasing plans.

- Green - Specified tasks are within approved budget plans, without utilizing reserves.
- Yellow - Specified tasks exceed the approved budget plans, but are within approved project reserves.
- Red- Specified tasks exceed the approved budget plan and approved reserves.

Schedule

Evaluate the use of your Program/Project reserves (slack) to maintain the critical path schedule and ensure the Program/Project delivery date approved in the Program/Project Plan is met.

- Green - Reserves for critical path schedule have not been used and major milestones are not delayed.
- Yellow - Reserves for critical path schedule are being used or major milestones are delayed, but project end date is not expected to slip.
- Red - Reserves for critical path schedules are depleted and project end date is expected to slip.

Technical Performance

Evaluate how your Program/Project is meeting the requirements for mission success that are documented in the approved Program/Project Plan.

- Green - Technical objectives are being met with no threat to mission success criteria.
- Yellow - Technical objectives are not being met and threaten mission success criteria, but the risk management plan specifies an acceptable contingency.
- Red - Unable to meet technical objectives and no contingency has been identified.

Glossary

C

Cluster: A custom grouping of initiatives for the purpose of viewing the contents of these initiatives in a read only status. Clusters are dentoted in the Initiative drop down menu with an *. When viewed it this state, data associated with the initiative may not be altered.

E

ePORT: electronic Project Online Reporting Tool. ePORT's objective is to provide a common framework for capturing the health statusof MSFC programs and projects that meet the guidelines of NPG 7120.5 to Provide AerospaceProducts and Capabilities (PAPAC).

M

MSFC: Marshall Space Flight Center

S

SSL: Secure Socket Layer Encryption.

Index